Membership Rewards®
Bonus Points Certificate Program

Merchant User Guide

Points International Ltd.

March 2008

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1 Introduction

This document serves as a user manual for the American Express® Bonus Points Certificate Program. In this manual you will find all of the information needed to manage your account in the Bonus Points Certificate program.

This document contains the following chapters:

- Understanding the Bonus Points Certificate Program - background information on the overall program
- Applying to the Bonus Points Certificate Program - how to apply and set up your account in Bonus Points Certificate Program
- Administering Your Account - instructions on managing your account and the users who have been granted access
- Buying Points - how to purchase bonus points that you can award as incentives to customers

1.1 Using This Guide

This document contains procedures that describe how to perform tasks related to your Bonus Points Certificate Program account. Each procedure begins with an introduction explaining the purpose of the task it describes. In some cases, more background information is required; this information is provided in sections with titles begin with the word "Understanding…"

Read the following section for an explanation of the way text in the procedures is formatted.

1.2 Typographical Conventions

Within this guide certain concepts or rules are used to display important text or to alert you to things you must do or beware of. These conventions include the following:

- Names of menus, commands, labels, and buttons are **bolded**.
- Keystrokes or keystroke combinations are set in an *italic* font. Where you see a plus sign between two keys, as in "Press *CTRL+ALT*", you should press both keys simultaneously. Where two or more keys are separated by commas, as in "Press *F1, ESC*", you should press and release the first key, then press and release the second key.

- If you are required to type a specific word, phrase, or set of characters, this is set in a bold, italic type face. For example, "Type ***Bonus Points Certificate Program***."
- If you are required to type something which varies from user to user, a "placeholder" appears in italics to represent what you are to type. For example, if you see "Type *username* and *password*" you would type your own username and password.
- Where sections or lines of code are shown for demonstration purposes, they are set as separate paragraphs in a monospace type face, as follows:

```
This is an example of a line of code.
```

- The first time you see a term that is defined in a glossary, that term is set in italics.
- Information that may be helpful, or may increase your understanding of the text, may appear in Note form. A Note looks like this:

Note: A note provides supplemental information. Information that is crucial to the performance of an action is always included with a procedure.

- Information about actions that you must do, or must avoid, in order to prevent loss of data or some equally serious disaster, is set out in a Caution. A Caution looks pretty much like a Note, but with a different label.

Caution: You must always take seriously any information contained within a Caution.

- Links to URLs or email addresses are underscored, as follows:

nosuchaddress@aexp.com

If you are reading this document on a computer and the link is colored blue, you can connect to the URL or email address represented by clicking the coloured text.

1.3 Documentation Feedback

Direct your comments and suggestions about this document to your Bonus Points Manager at American Express.

2 Understanding the Bonus Points Certificate Program

This chapter contains basic information describing the American Express Bonus Points Certificate Program.

The American Express Bonus Points Certificate Program allows you to purchase Membership Rewards points in bulk, and then distribute the points via certificates according to specific promotion set-ups to meet the objectives of your organization.

By participating in the Bonus Points Certificate Program you can use Membership Rewards points as an incentive in any of the following ways:

- Customer Promotions
    - Acquire new customers
    - Retain current customers
    - Enhance your current loyalty program
- Employee Recognition

The Bonus Points Certificate Program has been proven to increase the performance of program participants' incentive programs.

The program works this way:

- Pre-purchase bonus points, online, paying for them using the method that best suits your way of doing business.
- Award Membership Rewards bonus points through Bonus Points Certificates to recipients you choose, in denominations you choose. You can award Bonus Points Certificates in two different ways (printed certificate or email certificate).
- Track bonus points purchases and certificate awards online, and to view reports of your account activity.

The following chapters provide detailed instructions for performing all of these activities, beginning with the applying to participate in the Bonus Points Certificate Program and setting up of your Bonus Points Certificate Program account.

3 Applying to the Bonus Points Certificate Program

This chapter describes the process of applying to participate in the Bonus Points Certificate Program and, upon approval, setting up an account to manage the Program. This chapter contains the following sections:

3.1 Understanding Promotion Information

When applying for a Bonus Points Certificate Program account, you must provide information about the way in which you plan to use bonus points certificates as an incentive. As part of your application you are asked to do the following:

- Approximate duration of your promotion (more or less than a year)
- Type of customer behaviour you would like to encourage
- Approximate number of points you expect to award per year (note that your initial points purchase must be a minimum of 2,000,000 bonus points but they may be used over multiple promotions over the course of two (2) years.)
- Any restrictions you propose to impose on the promotion (such as minimum purchase required, or a maximum possible award)
- Award format (printed certificate, email certificate, or both)
- Marketing channels you propose to use

You provide this information on the High-Level Promotion Information page. The information you provide will help set up your account and promotion, should your application be approved.

Providing Promotion Information

- Applying to Participate in the Bonus Points Certificate Program
- Opening the Application Form
- Providing Company and Address Information
- Providing Contact Information
- Providing Customer Service Contact Information
- Providing high-level promotion information
- Accepting the Bonus Points Program Terms & Conditions

3.2 Understanding Promotion Information

When applying for a Bonus Points Certificate Program account, you must provide information about the way in which you plan to use bonus points certificates as an incentive. As part of your application you are asked to do the following:

- Approximate duration of your promotion (more or less than a year)
- Type of customer behaviour you would like to encourage
- Approximate number of points you expect to award per year (note that your initial points purchase must be a minimum of 2,000,000 bonus points but they may be used over multiple promotions over the course of two (2) years.)
- Any restrictions you propose to impose on the promotion (such as minimum purchase required, or a maximum possible award)
- Award format (printed certificate, email certificate, or both)
- Marketing channels you propose to use

You provide this information on the High-Level Promotion Information page. The information you provide will help set up your account and promotion, should your application be approved.

Providing Promotion Information

3.3 Applying to Participate in the Bonus Points Certificate Program

In order to award Bonus Points Certificates as incentives you must be enrolled in the program. Enrolment involves completing the Program application which requires the following information:

- Company and Address Information
- Company Contact Information
- Marketing Contact Information
- Customer Service Contact Information
- Billing Information

3.4 Opening the Application Form

To open the application form, do the following:

1. Browse to membershiprewards.com/MerchantCert
2. Click **Merchant Application Form**.

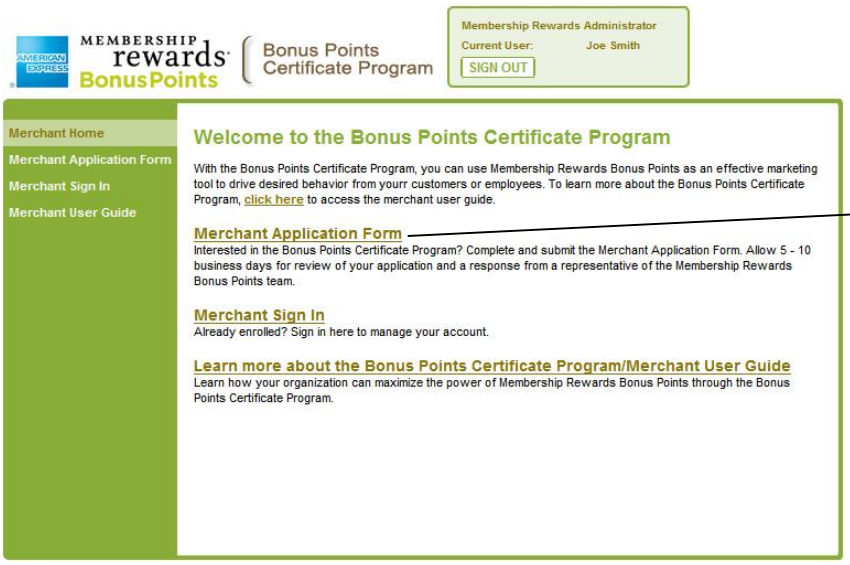

MEMBERSHIP rewards BonusPoints
Bonus Points Certificate Program
Membership Rewards Administrator
Current User: Joe Smith
SIGN OUT
Merchant Home
Merchant Application Form
Merchant Sign In
Merchant User Guide
Welcome to the Bonus Points Certificate Program
With the Bonus Points Certificate Program, you can use Membership Rewards Bonus Points as an effective marketing tool to drive desired behavior from yourr customers or employees. To learn more about the Bonus Points Certificate Program, click here to access the merchant user guide.
Merchant Application Form
Interested in the Bonus Points Certificate Program? Complete and submit the Merchant Application Form. Allow 5 - 10 business days for review of your application and a response from a representative of the Membership Rewards Bonus Points team.
Merchant Sign In
Already enrolled? Sign in here to manage your account.
Learn more about the Bonus Points Certificate Program/Merchant User Guide
Learn how your organization can maximize the power of Membership Rewards Bonus Points through the Bonus Points Certificate Program.
Click here to open the application form

Figure 1: Loading the application form

When the Application Form page opens, you begin a four-step process of providing information to support your application for an account.

3.5 Providing Company and Address Information

The first step of the application process requires you to provide information about your company. To provide company and address information, do the following (press *TAB* to move from box to box on the form):

1. In **Company Name**, type the version of your firm's name you want used with this account. The maximum number of characters you can use is 45.
2. In **Company name as it should appear on the Bonus Points Certificate issued to customers**, type the short version of the above name that you would like to appear in the Bonus Points Certificates that you issue to your customers/prospects.

Note: Membership Rewards reserves the right to change the display name.

3. Optionally, type your **Company Website Address**.
4. From **Business Country**, choose the country in which your business is headquartered.

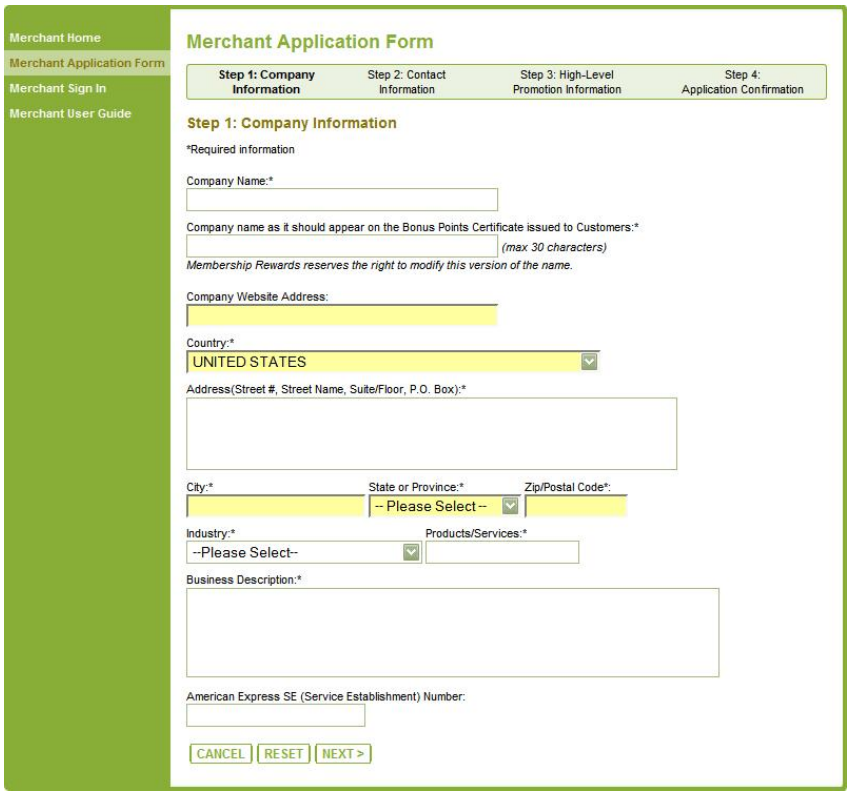


Figure 2: Providing company information

5. In the Address text-entry box, type your company's full street address or post office box of where your office is located.
6. Type the **City** and choose the **State or Province** in which your office is located, and type its **Zip/Postal Code**.
7. From **Industry**, choose the description that most closely matches the field in which your business operates. In **Products/Service**, type a brief description of your primary business activity.
8. In the **Business Description** text entry box, type a more detailed description of your business. Optionally, if you have an American Express SE Number, type it in the **American Express SE (Service Establishment) Number** box.
9. If you want to start again on this page, click **Reset**. When you are satisfied with the information you have provided, click **Next**.

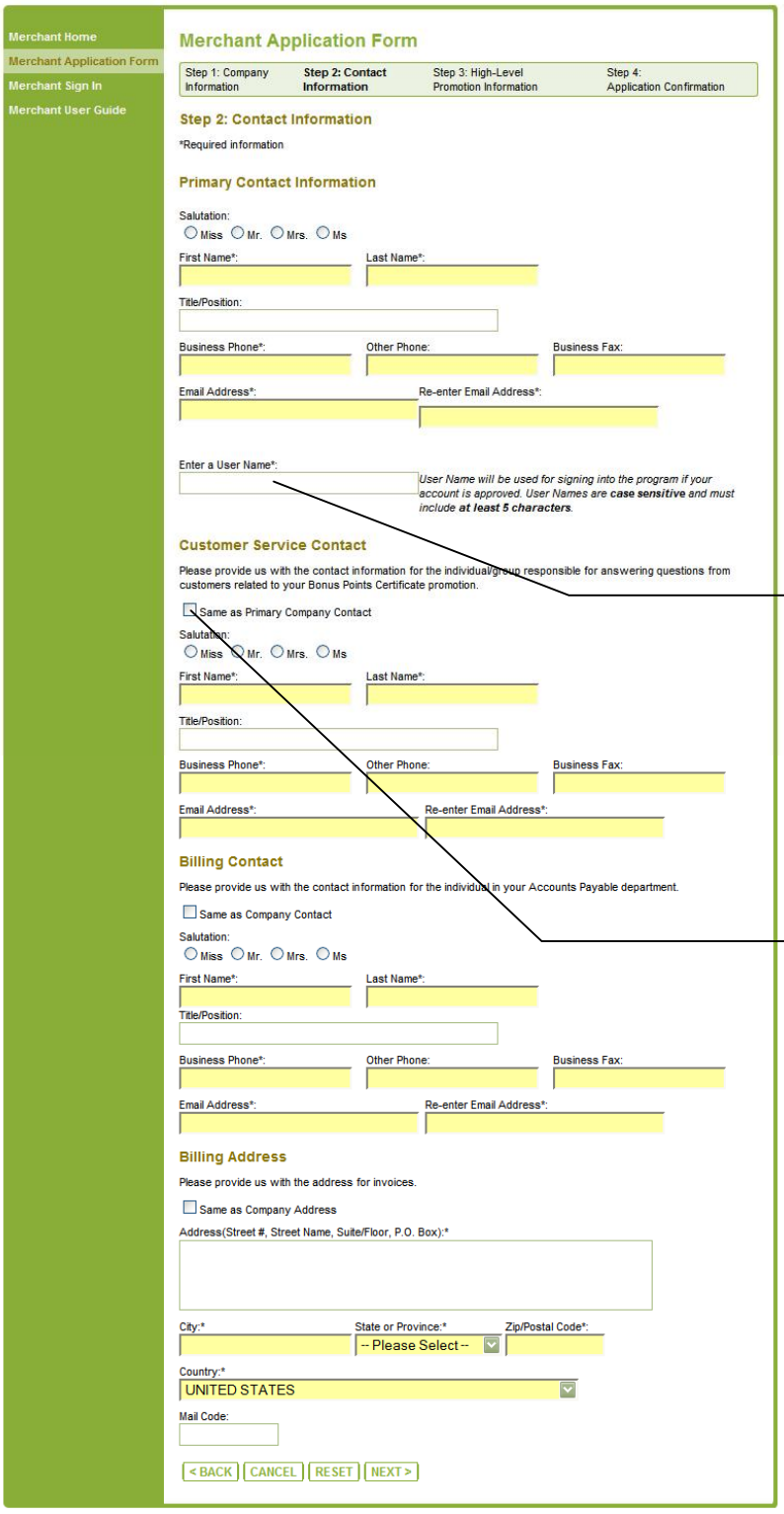
3.6 Providing Contact Information

The second step in the application process is to provide information that allows American Express to contact you. This process involves three separate steps.

3.6.1 Providing Primary Contact Information

To provide primary contact information, do the following:

1. Type the **First Name** and **Last Name** of the primary contact, the person to who will primarily manage this account (e.g. purchase points, manage promotions, award certificates). Optionally, you can select a salutation.
2. If you want, type the contact's **Title/Position**.
3. In **Business Phone**, type the contact's business telephone number. Optionally, in **Other Phone** type an alternate phone number (a mobile, for example) and in **Business Fax** type the contact's fax number.
4. In **Email Address**, type the contact's email address. Type the address again in **Re-enter Email Address** to confirm the address (the two addresses you type must match).
5. In **Enter a User Name**, type an identifier for your contact person to use with this account, if your application is approved. You must use at least five, and can use a maximum of 15, characters. You can use any mix of letters and numbers.
6. To continue providing contact information, see Providing Customer Service Contact Information. For a reference to the contact page of the application form, see Figure 3.


Merchant Home
Merchant Application Form
Merchant Sign In
Merchant User Guide
Merchant Application Form
Step 1: Company Information
Step 2: Contact Information
Step 3: High-Level Promotion Information
Step 4: Application Confirmation
Step 2: Contact Information
*Required information
Primary Contact Information
Salutation:
Miss Mr. Mrs. Ms
First Name*:
Last Name*:
Title/Position:
Business Phone*:
Other Phone:
Business Fax:
Email Address*:
Re-enter Email Address*:
Enter a User Name*:
User Name will be used for signing into the program if your account is approved. User Names are case sensitive and must include at least 5 characters.
Customer Service Contact
Please provide us with the contact information for the individual/group responsible for answering questions from customers related to your Bonus Points Certificate promotion.
Same as Primary Company Contact
Billing Contact
Please provide us with the contact information for the individual in your Accounts Payable department.
Same as Company Contact
Billing Address
Please provide us with the address for invoices.
Same as Company Address
Address(Street #, Street Name, Suite/Floor, P.O. Box):*
City:*
State or Province:*
-- Please Select --
Zip/Postal Code*:
Country:*
UNITED STATES
Mail Code:
< BACK
CANCEL
RESET
NEXT >

You must provide a user name for your primary user to allow for first sign-in

Select this box to pre-fill the form with data you've already entered

Figure 3: Providing contact information

3.6.2 Providing Customer Service Contact Information

You must provide contact information of an individual or group within your company who could respond to customer questions concerning a Bonus Points Certificate promotion. To provide customer service contact information, you have two choices:

- If the customer service contact is the same as the primary company contact, select the check box **Same as Primary Company Contact** and go on to Providing Billing Contact and Address Information
- If the customer service contact is not the same as the primary contact, do the following:

1. In **Salutation**, select the option that applies to your contact.
2. Type the contact's name in the **First Name** and **Last Name** boxes. Optionally, type the job title in **Title/Position**.
3. In **Business Phone**, type the contact's office telephone number. Optionally, type another number (a mobile, for example) in **Other Phone**, and a fax number in **Business Fax**.
4. In **Email Address** type the contacts email address. Confirm this by typing the address again in **Re-Enter Email Address**.

3.6.3 Providing Billing Contact and Address Information

To provide billing contact information, you have the following choices:

- If the billing contact is the same as the primary company contact, select the check box **Same as Primary Company Contact**
- If the billing address is the same as the company address, select the check box **Same as Company Address**
- If the billing contact is not the same as the primary contact, or the billing address is not the same as the company address, do the following:

1. In **Salutation**, select the option that applies to your billing contact.
2. Type the contact's name in the **First Name** and **Last Name** boxes. Optionally, type the job title in **Title/Position**.
3. In **Business Phone**, type the contact's office telephone number. Optionally, type another number (a mobile, for example) in **Other Phone**, and a fax number in **Business Fax**.
4. In **Email Address** type the contacts email address. Confirm this by typing the address again in **Re-Enter Email Address**.
5. In the **Address** text-entry box, type your company's billing address.
6. Type the **City** and choose the **State or Province** in which your office is located, and type its **Zip/Postal Code**.

7. From **Country** choose the country of your billing address.
8. If billing information requires specific mail direction as part of the address, type this in **Mail Code**.
9. Click **Next** to continue the application process.

3.7 Understanding Promotion Information

When applying for a Bonus Points Certificate Program account, you must provide information about the way in which you plan to use bonus points certificates as an incentive. As part of your application you are asked to do the following:

- Approximate duration of your promotion (more or less than a year)
- Type of customer behaviour you would like to encourage
- Approximate number of points you expect to award per year (note that your initial points purchase must be a minimum of 2,000,000 bonus points but they may be used over multiple promotions over the course of two (2) years.)
- Any restrictions you propose to impose on the promotion (such as minimum purchase required, or a maximum possible award)
- Award format (printed certificate, email certificate, or both)
- Marketing channels you propose to use

You provide this information on the High-Level Promotion Information page. The information you provide will help set up your account and promotion, should your application be approved.

3.8 Providing Promotion Information

To provide promotion information, do the following:

1. On the High-Level Promotion Information page, select the check box that most accurately describes the duration of your promotion:
   - If your promotion will last less than a year, select **Limited Time Promotion**
   - If your promotion will last longer than a year, select **Ongoing Promotion**
2. In the **What customer behaviour will be bonused** text-entry box, type a description of the behaviour you would like to encourage.
3. In **Number of Points expected to be awarded annually**, type the number of points you estimate to award each year.
4. Select the **Start Date** and **End Date** of your promotion from the appropriate sets of drop-down lists.
5. If there are no plans to add special restrictions to the promotion, select the **No** option button. If you are going to impose restrictions, select the **Yes** option button and then type a description of the restrictions in the text-entry box.

6. Select whichever of the check boxes **Hard Copy Certificate** or **Email Certificate** describes the way you want to deliver Bonus Points Certificates to customers. If you want to use both methods, select both check boxes.

MEMBERSHIP rewards BonusPoints
Bonus Points Certificate Program
Merchant Home
Merchant Application Form
Merchant Sign In
Merchant User Guide
Merchant Application Form
Step 1: Company Information
Step 2: Contact Information
Step 3: High-Level Promotion Information
Step 4: Application Confirmation
Step 3: High-Level Promotion Information
*Required information
High-Level Promotion Concept:*
Limited Time Promotion (Less than 1 year)
Ongoing Promotion (Greater than 1 year)
What customer behavior will be bonused?* (Please provide a high-level promotion description.)
Number of Points expected to be awarded annually:*
Note: Initial purchase of 800,000 bonus points is required.
Expected Promotion Start Date:* Mar 3 2008
Expected Promotion End Date:* Mar 3 2008
Do you plan to add any special restrictions to the promotion? (i.e.: minimum spend, points maximum)*
No
Yes - Please explain
Do you plan to award the Bonus Points Certificate to customers via: (check all that apply)*
Hard Copy Certificate
Email Certificate
In which channels do you plan to market the Bonus Points Certificate Program?* Please select all that apply.
In-Store
Online
Phone
Other:
(please specify)
Terms & Conditions
Please click here to view the Terms and Conditions of the Bonus Points Certificate Program. To submit the application, you must indicate your acceptance and understanding of the Terms & Conditions by checking the box below.
I have reviewed and accept the Bonus Points Certificate Program Terms & Conditions.
I have reviewed the Bonus Points Certificate Program Terms & Conditions and accept pending the following modifications:
* American Express reserves the right to not accept this enrollment form based on any modifications to the terms and conditions.
< BACK
CANCEL
RESET
SUBMIT
points.com Powered
Need Help? Certificate Program Terms and Conditions | Privacy Policy | FAQ | Merchant User Guide | Contact Us

Figure 4: Providing promotion information

7. Select the check boxes that describe the marketing channels you intend to use in promoting the Bonus Points Certificate Program. Select all that apply. If you select **Other**, type an explanation in the box to the right of the check box.
8. Read the Terms & Conditions that apply to the Bonus Points Certificate Program. When you have finished, select the check box that confirms your acceptance of these Terms & Conditions. You may request modifications to the terms and conditions and they will be reviewed by a Bonus Points Manager when considering your application.
9. If you want to start again on this page, click **Reset**. When you are satisfied with the information you have provided, click **Next**.

When you click **Next** your application is automatically submitted to the Bonus Points Certificate Program administrators. The Application Confirmation page confirms the submission of your application for the Bonus Points Certificate Program.

The administrators process the application, and send notification to the email address you provided for your primary Company Contact. Please allow up to ten business days for review of your application.

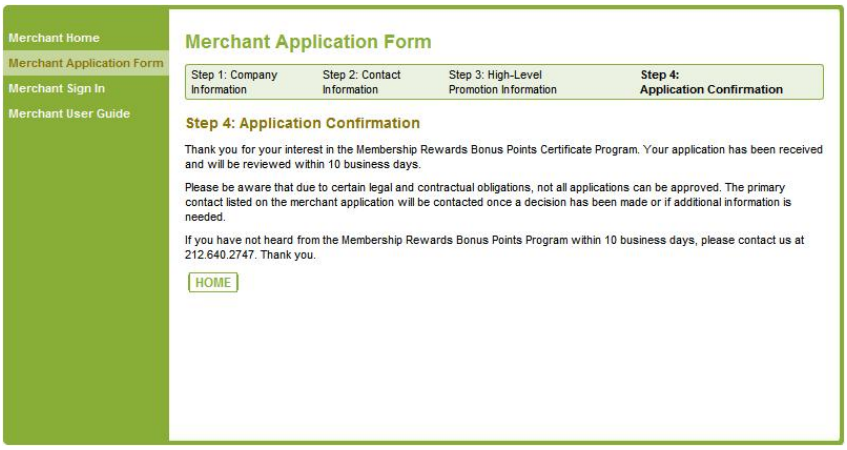

Merchant Home
Merchant Application Form
Merchant Sign In
Merchant User Guide
Merchant Application Form
Step 1: Company Information
Step 2: Contact Information
Step 3: High-Level Promotion Information
Step 4: Application Confirmation
Step 4: Application Confirmation
Thank you for your interest in the Membership Rewards Bonus Points Certificate Program. Your application has been received and will be reviewed within 10 business days.
Please be aware that due to certain legal and contractual obligations, not all applications can be approved. The primary contact listed on the merchant application will be contacted once a decision has been made or if additional information is needed.
If you have not heard from the Membership Rewards Bonus Points Program within 10 business days, please contact us at 212.640.2747. Thank you.
HOME

Figure 5: Application Confirmation page

Once your application is approved and you have received an email advising you've been approved, you can begin purchasing and awarding points immediately.

4 Administering Your Account

Once your application for a Bonus Points Certificate Program account is approved, you can begin managing your account. This chapter contains information about basic procedures you will use in the administration and operation of your account.

This chapter contains the following sections:

- Setting a Password
- Signing In
- Changing Your Password
- Changing Your Account Information
- Adding a New User
- Changing Company Contact Information
- Viewing Your Account Summary
- Viewing Purchase History

4.1 Setting a Password

The first time you try to sign in to your account, you will be prompted to set a password. You will use this password each time you sign in to your account.

To set a password, do the following:

1. In the **User Name** box on the Login page, type the user name set when your account was created.
2. In **Password**, type the temporary password sent when your account was approved. Click **Sign In**. The Change Password page opens.

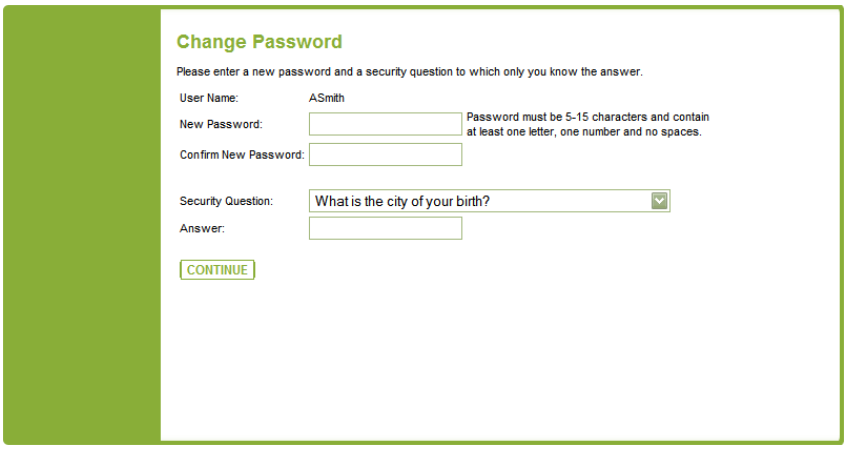

Change Password
Please enter a new password and a security question to which only you know the answer.
User Name:
ASmith
New Password:
Password must be 5-15 characters and contain at least one letter, one number and no spaces.
Confirm New Password:
Security Question:
What is the city of your birth?
Answer:
CONTINUE

Figure 6: Signing in for the first time

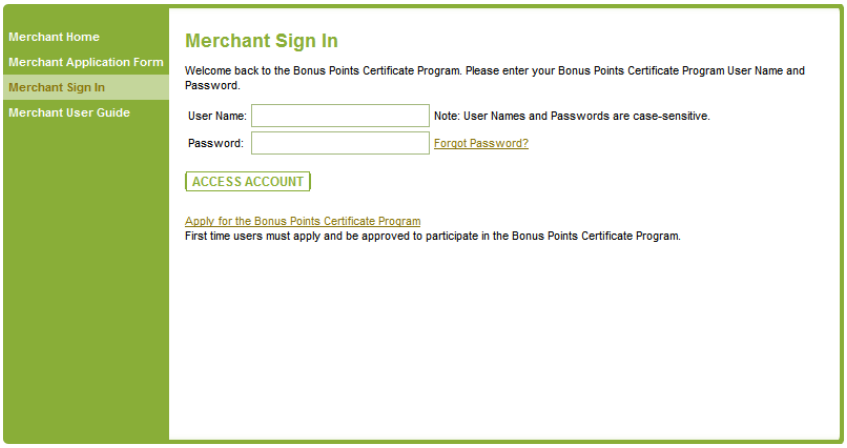
3. In **New Password**, type the password you want to use with this account.
4. In **Confirm New Password**, retype the password exactly as you typed it in the previous step.
5. From **Security Question** choose a question to use in authenticating your identity. The answer to this question should be easy for you to remember or locate, but not obvious to others.
6. In **Answer**, type the answer to the question you chose.
7. Click **Continue**.

You only have to use this procedure the first time you sign in. See the following section for instructions on regular signing in.

4.2 Signing In

To sign in to your account, do the following:

1. On the menu bar of the Home page, click **Merchant Sign In**.
2. In the **User Name** box of the Merchant Sign In page, type your user name.
3. In **Password**, type your password.
4. Click **Access Account**.


Merchant Home
Merchant Application Form
Merchant Sign In
Merchant User Guide
Merchant Sign In
Welcome back to the Bonus Points Certificate Program. Please enter your Bonus Points Certificate Program User Name and Password.
User Name:
Note: User Names and Passwords are case-sensitive.
Password:
Forgot Password?
ACCESS ACCOUNT
Apply for the Bonus Points Certificate Program
First time users must apply and be approved to participate in the Bonus Points Certificate Program.

When you sign in, the Account Summary page loads. From here you can perform most administrative tasks associated with your account.

4.3 Changing Your Account Settings

You can make changes to various aspects of your account, to reflect changes to your operations or your use of Bonus Points Certificate Program. This section contains procedures for making these changes.

4.3.1 Changing Your Password

To change your password, do the following:

1. From any page on the Bonus Points Certificate Program site, click **Manage Users/Account Settings**.

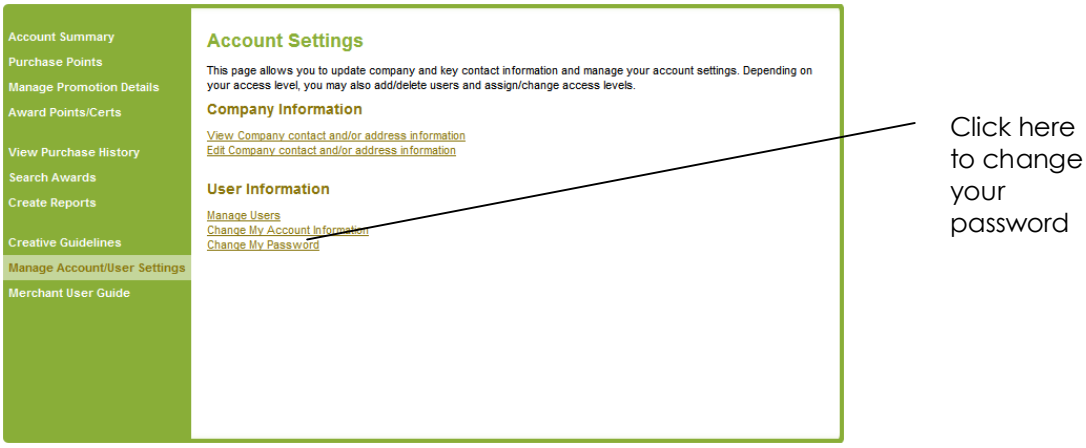

Account Summary
Purchase Points
Manage Promotion Details
Award Points/Certs
View Purchase History
Search Awards
Create Reports
Creative Guidelines
Manage Account/User Settings
Merchant User Guide
Account Settings
This page allows you to update company and key contact information and manage your account settings. Depending on your access level, you may also add/delete users and assign/change access levels.
Company Information
View Company contact and/or address information
Edit Company contact and/or address information
User Information
Manage Users
Change My Account Information
Change My Password
Click here to change your password

Figure 7: The Account Settings page

2. On the Account Settings page, click **Change My Password**.

Figure 8: Changing a password

3. In **Old Password** on the Change My Password window, type your current password.
4. In **New Password**, type the new password you want to use.
5. In **Confirm New Password**, retype the password exactly as you typed it in the previous step.
6. Click **Submit**.

Note: You can also change your security question, and record a new answer, in this window.

Note: Your username and password are both case-sensitive.

4.3.2 Changing Your Account Information

You can change certain details of your own user account within your organization's Bonus Points Certificate Program account. You can change any of the following:

- First Name and Last Name
- Email Address

You cannot change your access level, status or user name.

To change your account information, do the following:

1. From any page on the Bonus Points Certificate Program site, click **Mange Account/User Settings**.

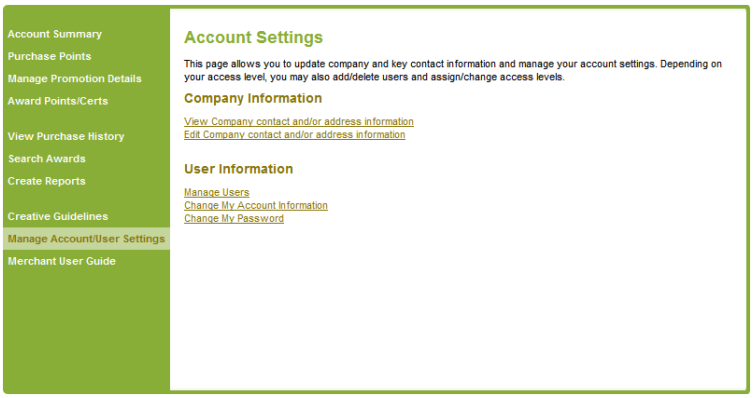

Account Summary
Purchase Points
Manage Promotion Details
Award Points/Certs
View Purchase History
Search Awards
Create Reports
Creative Guidelines
Manage Account/User Settings
Merchant User Guide
Account Settings
This page allows you to update company and key contact information and manage your account settings. Depending on your access level, you may also add/delete users and assign/change access levels.
Company Information
View Company contact and/or address information
Edit Company contact and/or address information
User Information
Manage Users
Change My Account Information
Change My Password

Figure 9: Account Settings page

2. On the Account Settings page, click **Change My Account Information**.
3. Make any changes you want to your information.

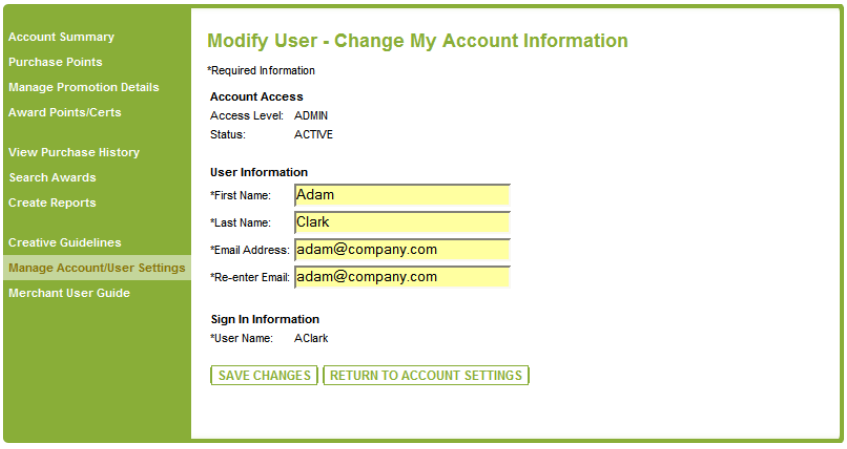


Figure 10: Changing account information in the Modify User page

4. To confirm the changes, click **Save Changes**.

4.3.3 Adding a New User

You must be an administrative-level user in order to add a new user. To add a new user, do the following:

1. From any page on the Bonus Points Certificate Program site, click **Manage Account/User Settings**.
2. On the Account Settings page, click **Manage Users**.
3. On the Manage Users page, click **Create New User**.

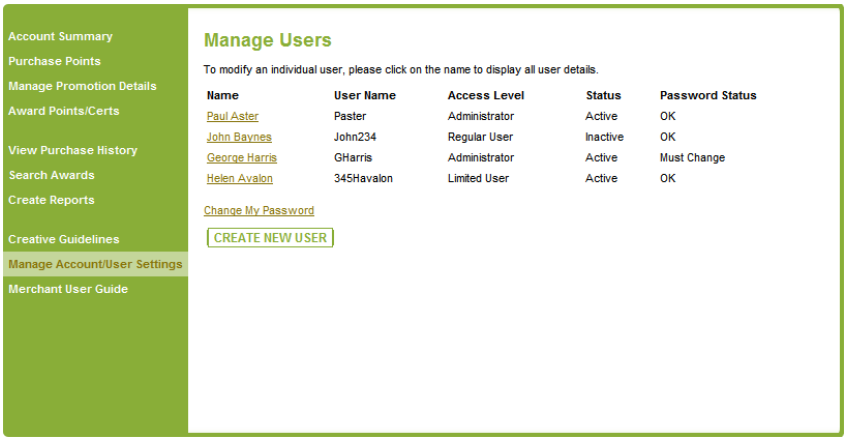


Figure 11: Manage Users page

4. On the Create User page, from **Access Level** choose the degree of access you want the new user to have.
5. From **Status**, choose the status you want to assign this user. (Choose "Active" unless you are creating a user who will not have to have access to the account for some time.)
6. Type user account information into **First Name, Last Name** and **Email Address**. To confirm the email address, retype it in **Re-enter Email**.
7. In **User Name**, type this user's user name. This is the name the user will use when signing on to the system. User Names are case sensitive and must include at least 5 characters.
8. Click **Save**.

Figure 12: Creating a new user

When you save a new user record, the system generates a new, temporary, password and emails it to the address you provided for the user. The first time the new user signs in to the system, he or she will be prompted to set a new password.

4.3.4 Changing Company Contact Information

You can change any of the information previously recorded to describe your company contacts, your company, or its address. If you change company information, though, you must ensure that your changes do not leave a required box or list empty.

To change information identifying your company contacts or address, do the following:

1. From any page on the Bonus Points Certificate Program site, click **Manage Account/User Settings.**
2. On the Account Settings page, click **Edit Company contact and/or address information**.
3. Make any changes you wish.
4. To record your changes, click **Save**.

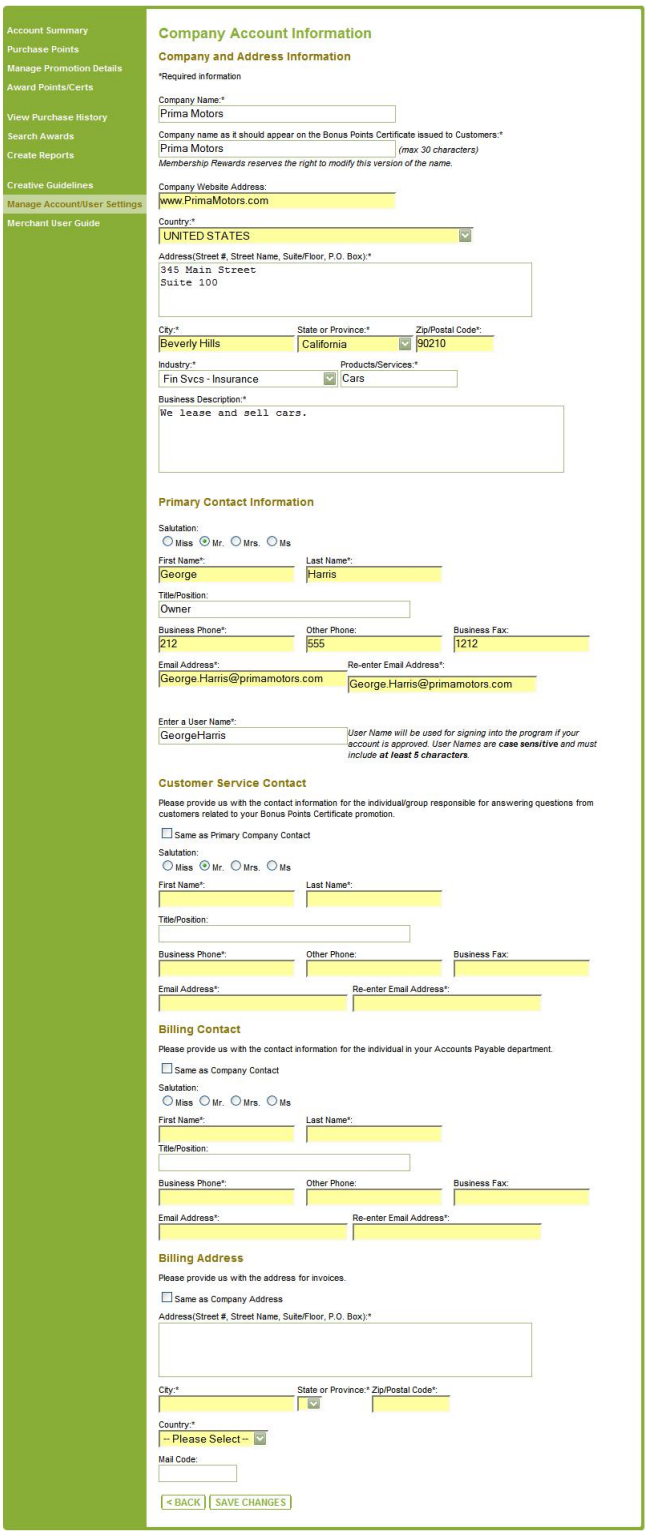


Figure 13: Changing company profile information

4.4 Viewing Your Account Summary

Your account summary is a brief report of account status. It shows you the following:

- Total number of points available for awarding
- Total number of points you have purchased to date
- Any adjustments to your points balance
- Number of points purchased with payment pending. This summary provides totals only. In order to see details of your account activity, you should view your purchase history or reports.

To view your account summary, do the following:

- From any page on the Bonus Points Certificate Program site, click **Account Summary**.

Figure 14: Account Summary page

4.5 Viewing Purchase History

Your purchase history provides an overview of bonus points purchases you have made over the life of your account. It also gives you access to the details of individual purchases.

4.5.1 Understanding Purchase History

Your purchase history provides both list and detail views of your purchases. The list view includes the following information:

- Order ID: the unique identifier for each purchase request you've made
- Purchase Date: the day on which you made the request
- Purchaser: the individual user who made the request
- Points: the number of points purchased in an order

- Status: the current status of an order

The detail view includes, for a given order, the following information:

- Purchase Date: the day on which you made the request
- Order ID: the unique identifier for this purchase request
- Purchaser: the individual user who made the request
- Status: the current status of this order
- Payment Method: the means by which this order was paid for
- Total Points: total number of bonus points purchased in this order
- Cost Per Point: cost of each point purchased
- Cost of Points: the number of points multiplied by cost per point
- Processing Fee: the service charge, if any, for this order
- Invoice total: the full amount charged to you for this order

4.5.2 Viewing the Purchase List

To view the Purchase History list view, do the following:

- From any page on the Bonus Points Certificate Program site, click **Purchase History**.

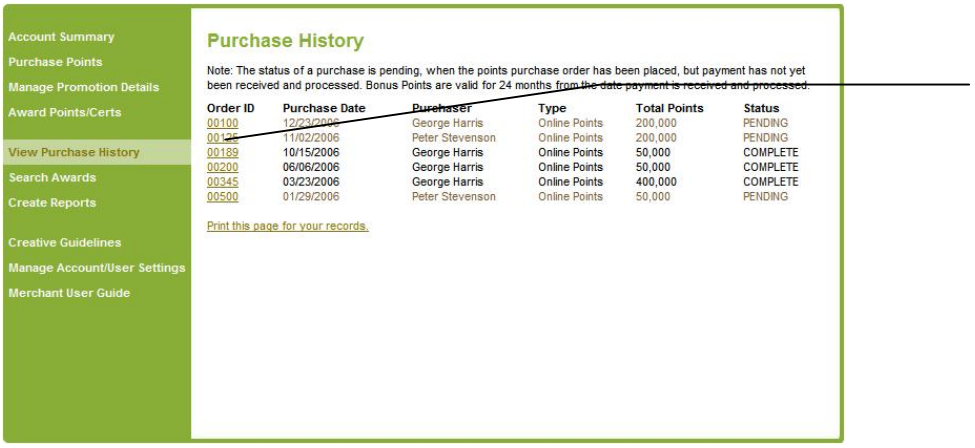

Account Summary
Purchase Points
Manage Promotion Details
Award Points/Certs
View Purchase History
Search Awards
Create Reports
Creative Guidelines
Manage Account/User Settings
Merchant User Guide
Purchase History
Note: The status of a purchase is pending, when the points purchase order has been placed, but payment has not yet been received and processed. Bonus Points are valid for 24 months from the date payment is received and processed.
Order ID Purchase Date Purchaser Type Total Points Status
00100 12/23/2006 George Harris Online Points 200,000 PENDING
00135 11/02/2006 Peter Stevenson Online Points 200,000 PENDING
00189 10/15/2006 George Harris Online Points 50,000 COMPLETE
00200 06/06/2006 George Harris Online Points 50,000 COMPLETE
00345 03/23/2006 George Harris Online Points 400,000 COMPLETE
00500 01/29/2006 Peter Stevenson Online Points 50,000 PENDING
Print this page for your records.
Click an order ID to see details of that order

Figure 15: Viewing purchase history

4.5.3 Viewing Purchase Details

To view the details of a specific order, do the following:

1. From any page on the Bonus Points Certificate Program site, click **Purchase History**.
2. On the Purchase History page, click the **Order ID** of the order you want to view.

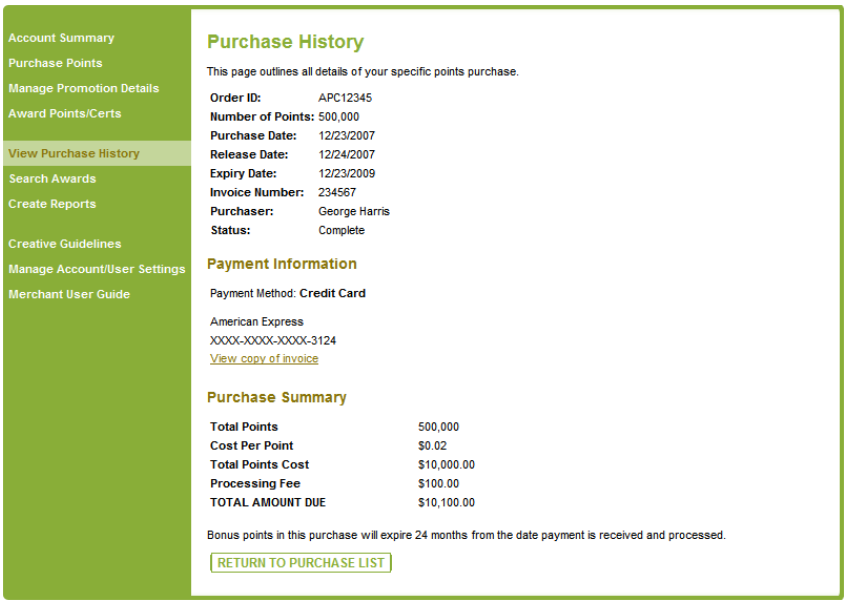


Figure 16: Viewing details of a purchase

5 Buying Points

This chapter contains detailed instructions for making purchases of points through the Bonus Points Certificate Program website. This chapter contains the following sections:

- Selecting a Purchase Amount
- Providing Payment Information
- Completing your Order
- Purchase Confirmation

5.1 *Selecting a Purchase Amount*

To select a purchase amount, do the following:

1. On the navigation bar, click **Purchase Points**.

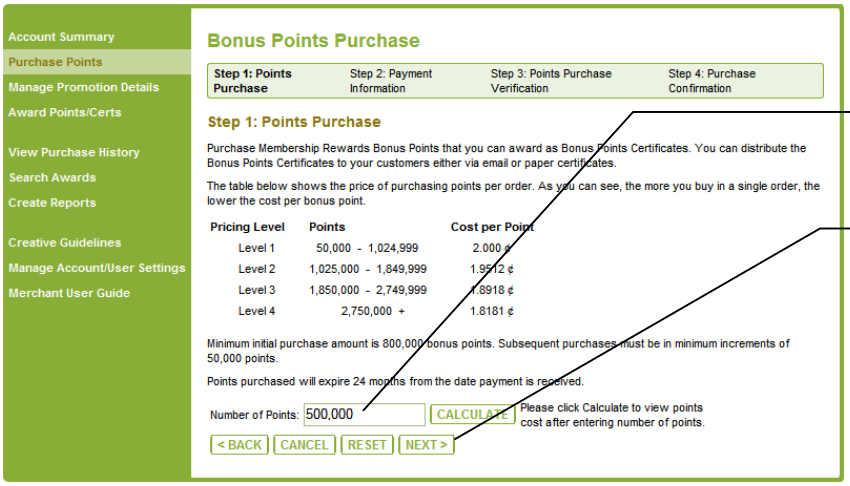

Account Summary
Purchase Points
Manage Promotion Details
Award Points/Certs
View Purchase History
Search Awards
Create Reports
Creative Guidelines
Manage Account/User Settings
Merchant User Guide
Bonus Points Purchase
Step 1: Points Purchase
Step 2: Payment Information
Step 3: Points Purchase Verification
Step 4: Purchase Confirmation
Step 1: Points Purchase
Purchase Membership Rewards Bonus Points that you can award as Bonus Points Certificates. You can distribute the Bonus Points Certificates to your customers either via email or paper certificates.
The table below shows the price of purchasing points per order. As you can see, the more you buy in a single order, the lower the cost per bonus point.
Pricing Level Points Cost per Point
Level 1 50,000 - 1,024,999 2.000 ¢
Level 2 1,025,000 - 1,849,999 1.9512 ¢
Level 3 1,850,000 - 2,749,999 1.8918 ¢
Level 4 2,750,000 + 1.8181 ¢
Minimum initial purchase amount is 800,000 bonus points. Subsequent purchases must be in minimum increments of 50,000 points.
Points purchased will expire 24 months from the date payment is received.
Number of Points: 500,000
CALCULATE
Please click Calculate to view points cost after entering number of points.
< BACK
CANCEL
RESET
NEXT >
Click Calculate after typing a value into this box
You must click the button after typing the number of points you want to buy

Figure 17: Purchase Points page

2. In the **Number of Points** box on the Bonus Points Purchase page, type the number of points you want to buy.

Note: The minimum order is 50,000 points. (Your first order, though, must be for at least 2,000,000 points.) The price per point is shown in the table above the **Number of Points** box; this price is rounded to four decimal places. To see the full price, clear the check-box beneath the table.

3. Click Calculate.

Caution: You must click **Calculate** before you click **Next**, or the system will not save the purchase amount you typed.

4. Review the purchase cost that appears. If you want to change the number of points you are buying, do steps 2 and 3 again, typing a new number.
5. When you are satisfied with your purchase amount, click **Next**.

5.2 Providing Payment Information

Once you have specified the number of points you want to buy, you must specify the form of payment. To provide payment information, do the following:

1. On the Payment Information page, select your **Method of Payment** from the list.

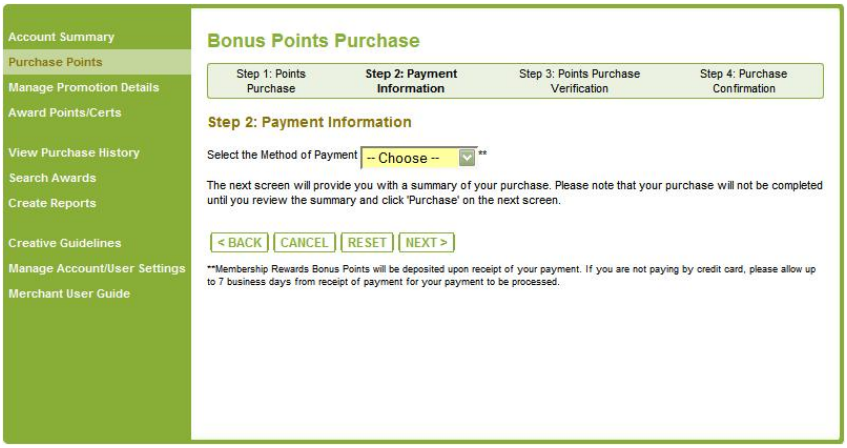

Account Summary
Purchase Points
Manage Promotion Details
Award Points/Certs
View Purchase History
Search Awards
Create Reports
Creative Guidelines
Manage Account/User Settings
Merchant User Guide
Bonus Points Purchase
Step 1: Points Purchase
Step 2: Payment Information
Step 3: Points Purchase Verification
Step 4: Purchase Confirmation
Step 2: Payment Information
Select the Method of Payment -- Choose --
The next screen will provide you with a summary of your purchase. Please note that your purchase will not be completed until you review the summary and click 'Purchase' on the next screen.
< BACK
CANCEL
RESET
NEXT >
**Membership Rewards Bonus Points will be deposited upon receipt of your payment. If you are not paying by credit card, please allow up to 7 business days from receipt of payment for your payment to be processed.

Figure 18: Choosing a payment method

2. If your method of payment is check, money order or wire transfer, take note of the instructions and then continue on to step 9.

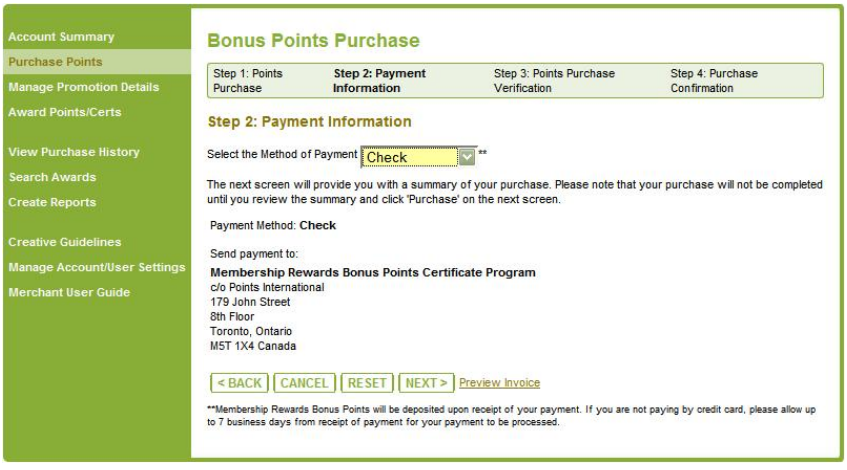

Account Summary
Purchase Points
Manage Promotion Details
Award Points/Certs
View Purchase History
Search Awards
Create Reports
Creative Guidelines
Manage Account/User Settings
Merchant User Guide
Bonus Points Purchase
Step 1: Points Purchase
Step 2: Payment Information
Step 3: Points Purchase Verification
Step 4: Purchase Confirmation
Step 2: Payment Information
Select the Method of Payment Check
The next screen will provide you with a summary of your purchase. Please note that your purchase will not be completed until you review the summary and click 'Purchase' on the next screen.
Payment Method: Check
Send payment to:
Membership Rewards Bonus Points Certificate Program
c/o Points International
179 John Street
8th Floor
Toronto, Ontario
M5T 1X4 Canada
< BACK
CANCEL
RESET
NEXT >
Preview Invoice
**Membership Rewards Bonus Points will be deposited upon receipt of your payment. If you are not paying by credit card, please allow up to 7 business days from receipt of payment for your payment to be processed.

Figure 19: Payment by check

3. If your method of payment is credit card, from **Credit Card Type**, select the card you want to use.

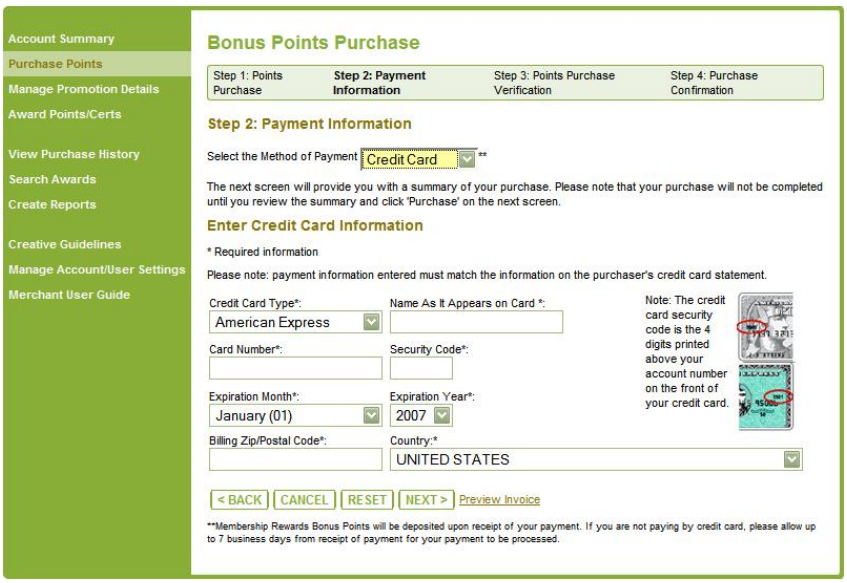

Account Summary
Purchase Points
Manage Promotion Details
Award Points/Certs
View Purchase History
Search Awards
Create Reports
Creative Guidelines
Manage Account/User Settings
Merchant User Guide
Bonus Points Purchase
Step 1: Points Purchase
Step 2: Payment Information
Step 3: Points Purchase Verification
Step 4: Purchase Confirmation
Step 2: Payment Information
Select the Method of Payment
Credit Card
**
The next screen will provide you with a summary of your purchase. Please note that your purchase will not be completed until you review the summary and click 'Purchase' on the next screen.
Enter Credit Card Information
* Required information
Please note: payment information entered must match the information on the purchaser's credit card statement.
Credit Card Type*:
American Express
Name As It Appears on Card *:
Card Number*:
Security Code*:
Note: The credit card security code is the 4 digits printed above your account number on the front of your credit card.
Expiration Month*:
January (01)
Expiration Year*:
2007
Billing Zip/Postal Code*:
Country:*
UNITED STATES
< BACK
CANCEL
RESET
NEXT >
Preview Invoice
**Membership Rewards Bonus Points will be deposited upon receipt of your payment. If you are not paying by credit card, please allow up to 7 business days from receipt of payment for your payment to be processed.

Figure 20: Credit card payment form

4. In **Name**, type the cardholder's name as it appears on the card.
5. In **Card Number** type the number of the card you are using.
6. In **Security Code** type the card's code number. Depending on the card you use this will be on the front or the back of the card, and either a three- or a four-digit number.
7. From the **Expiration Month** and **Expiration Year** lists, choose the month and year the card expires.
8. In **Billing Zip/Postal Code**, type the Zip or postal code of the card's billing address. From **Country** select the country of the billing address.
9. Click **Next**.

5.3 Completing Your Order

To complete your order, do the following:

1. On the Points Purchase Verification page, click the **Bonus Points Agreement** link and read the Bonus Points Certificate Program agreement carefully. You must signify acceptance of these terms to complete your order. The agreement is legally binding and non-compliance grants the Bonus Points Certificate Program the right to take the necessary actions to correct the situation.
2. When you have read the terms and conditions, close the window or browser tab in which the document opened.
3. On the Points Purchase Verification page, select the check-box to confirm your understanding and acceptance of the terms of this purchase.

4. Click **Purchase**.

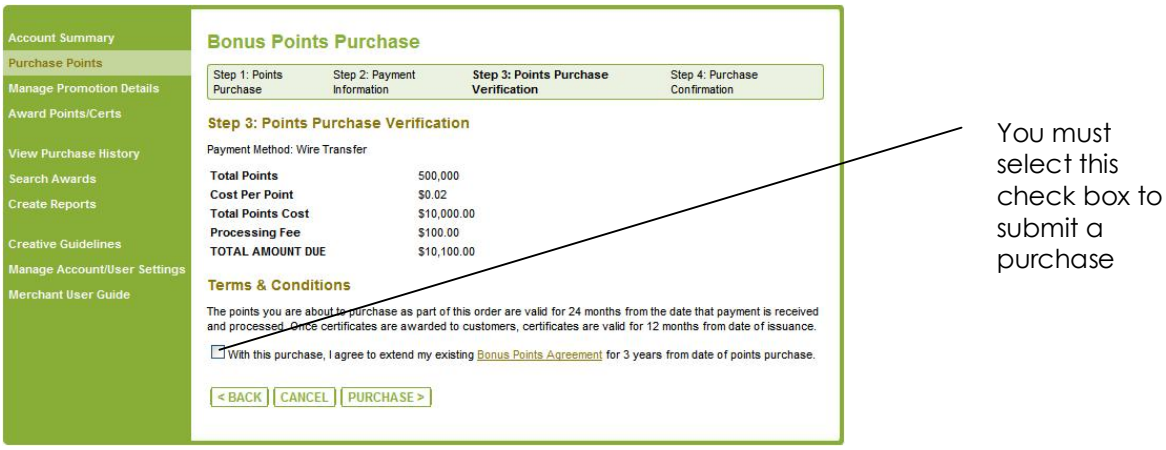
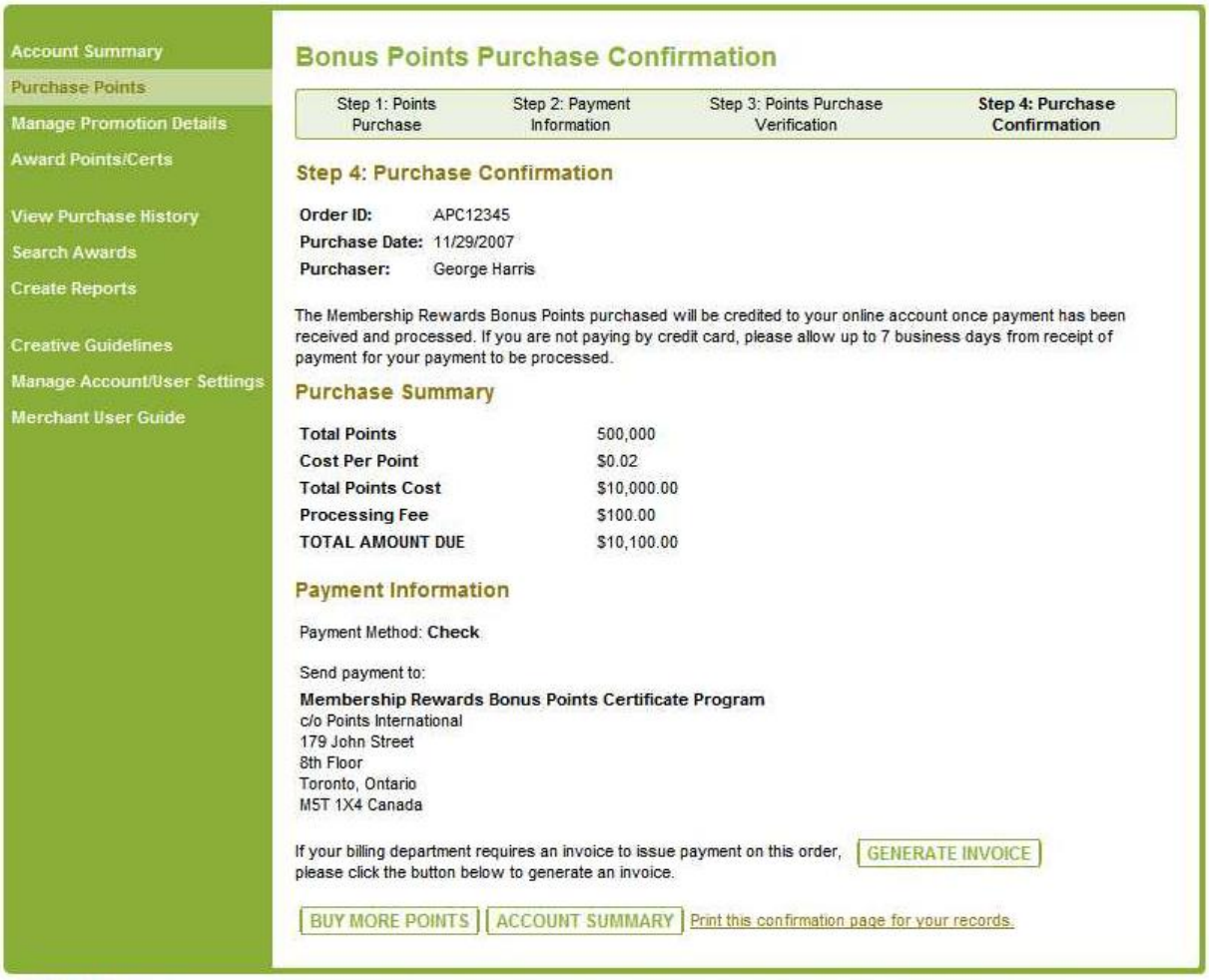

Account Summary
Purchase Points
Manage Promotion Details
Award Points/Certs
View Purchase History
Search Awards
Create Reports
Creative Guidelines
Manage Account/User Settings
Merchant User Guide
Bonus Points Purchase
Step 1: Points Purchase
Step 2: Payment Information
Step 3: Points Purchase Verification
Step 4: Purchase Confirmation
Step 3: Points Purchase Verification
Payment Method: Wire Transfer
Total Points 500,000
Cost Per Point $0.02
Total Points Cost $10,000.00
Processing Fee $100.00
TOTAL AMOUNT DUE $10,100.00
Terms & Conditions
The points you are about to purchase as part of this order are valid for 24 months from the date that payment is received and processed. Once certificates are awarded to customers, certificates are valid for 12 months from date of issuance.
With this purchase, I agree to extend my existing Bonus Points Agreement for 3 years from date of points purchase.
< BACK
CANCEL
PURCHASE >
You must select this check box to submit a purchase

Figure 21: Verifying your points purchase

Caution: Do not click **Purchase** more than once per order. If you are paying by credit card, you may be charged each time you click the **Purchase** button.

5.4 Purchase Confirmation

Once your order is complete you are presented the confirmation screen


Account Summary
Purchase Points
Manage Promotion Details
Award Points/Certs
View Purchase History
Search Awards
Create Reports
Creative Guidelines
Manage Account/User Settings
Merchant User Guide
Bonus Points Purchase Confirmation
Step 1: Points Purchase
Step 2: Payment Information
Step 3: Points Purchase Verification
Step 4: Purchase Confirmation
Step 4: Purchase Confirmation
Order ID: APC12345
Purchase Date: 11/29/2007
Purchaser: George Harris
The Membership Rewards Bonus Points purchased will be credited to your online account once payment has been received and processed. If you are not paying by credit card, please allow up to 7 business days from receipt of payment for your payment to be processed.
Purchase Summary
Total Points 500,000
Cost Per Point $0.02
Total Points Cost $10,000.00
Processing Fee $100.00
TOTAL AMOUNT DUE $10,100.00
Payment Information
Payment Method: Check
Send payment to:
Membership Rewards Bonus Points Certificate Program
c/o Points International
179 John Street
8th Floor
Toronto, Ontario
M5T 1X4 Canada
If your billing department requires an invoice to issue payment on this order, please click the button below to generate an invoice.
GENERATE INVOICE
BUY MORE POINTS
ACCOUNT SUMMARY
Print this confirmation page for your records.

1. If you chose to pay by **check**, **money order** or **wire transfer** the confirmation screen provides the details for completing your payment.
2. Click Generate Invoice to view a printable invoice detailing your purchase.

6 Promotions

The chapter describes how to create and manage your promotions. You must create a promotion and have it approved by your Bonus Points Administrator before you can begin awarding Bonus points.

This chapter contains the following sections:

- Managing Promotion Details
- Requesting a New Promotion
- Viewing a Promotion

6.1 Managing Promotion Details

Use this screen to manage your existing promotions and request a new promotion. The Manage Promotion Details screen is broken into the following sections.

- Current Promotions
- Promotions Awaiting Approval
- Expired Promotions

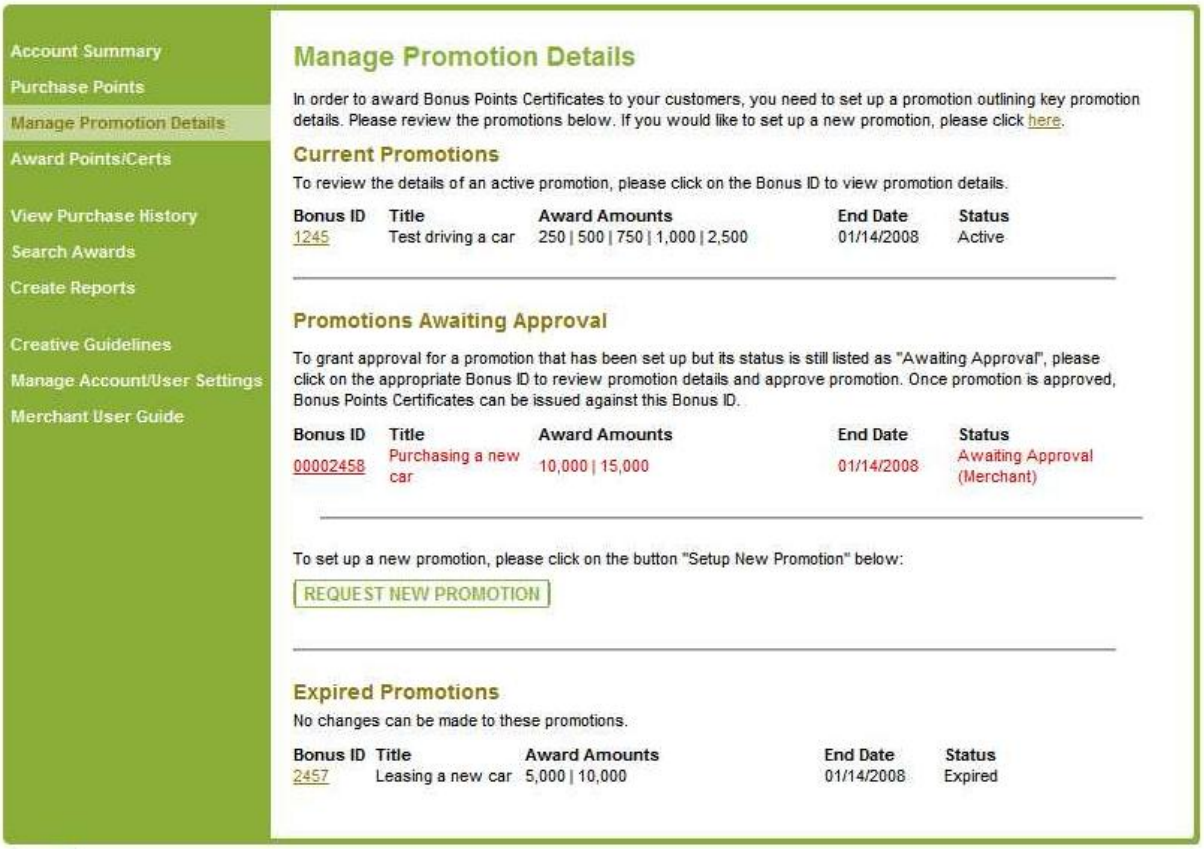

Account Summary
Purchase Points
Manage Promotion Details
Award Points/Certs
View Purchase History
Search Awards
Create Reports
Creative Guidelines
Manage Account/User Settings
Merchant User Guide
Manage Promotion Details
In order to award Bonus Points Certificates to your customers, you need to set up a promotion outlining key promotion details. Please review the promotions below. If you would like to set up a new promotion, please click here.
Current Promotions
To review the details of an active promotion, please click on the Bonus ID to view promotion details.
Bonus ID Title Award Amounts End Date Status
1245 Test driving a car 250 | 500 | 750 | 1,000 | 2,500 01/14/2008 Active
Promotions Awaiting Approval
To grant approval for a promotion that has been set up but its status is still listed as "Awaiting Approval", please click on the appropriate Bonus ID to review promotion details and approve promotion. Once promotion is approved, Bonus Points Certificates can be issued against this Bonus ID.
Bonus ID Title Award Amounts End Date Status
00002458 Purchasing a new car 10,000 | 15,000 01/14/2008 Awaiting Approval (Merchant)
To set up a new promotion, please click on the button "Setup New Promotion" below:
REQUEST NEW PROMOTION
Expired Promotions
No changes can be made to these promotions.
Bonus ID Title Award Amounts End Date Status
2457 Leasing a new car 5,000 | 10,000 01/14/2008 Expired

Figure 22: Manage Promotion Details

1. The Current Promotions section contains all promotions that are active and available for the awarding of Bonus Points Certificates
2. The Promotions Awaiting Approval section contains all promotions which are awaiting approval from a Bonus Points Administrator or your merchant account.
3. Expired Promotions contain a list of all promotions which have expired and can no longer be used. Expired promotions will disappear from this screen 2 months after expiry.

6.2 Requesting a New Promotion

1. Select **Request New Promotion** on the Manage Promotion details screen to request a new promotion.

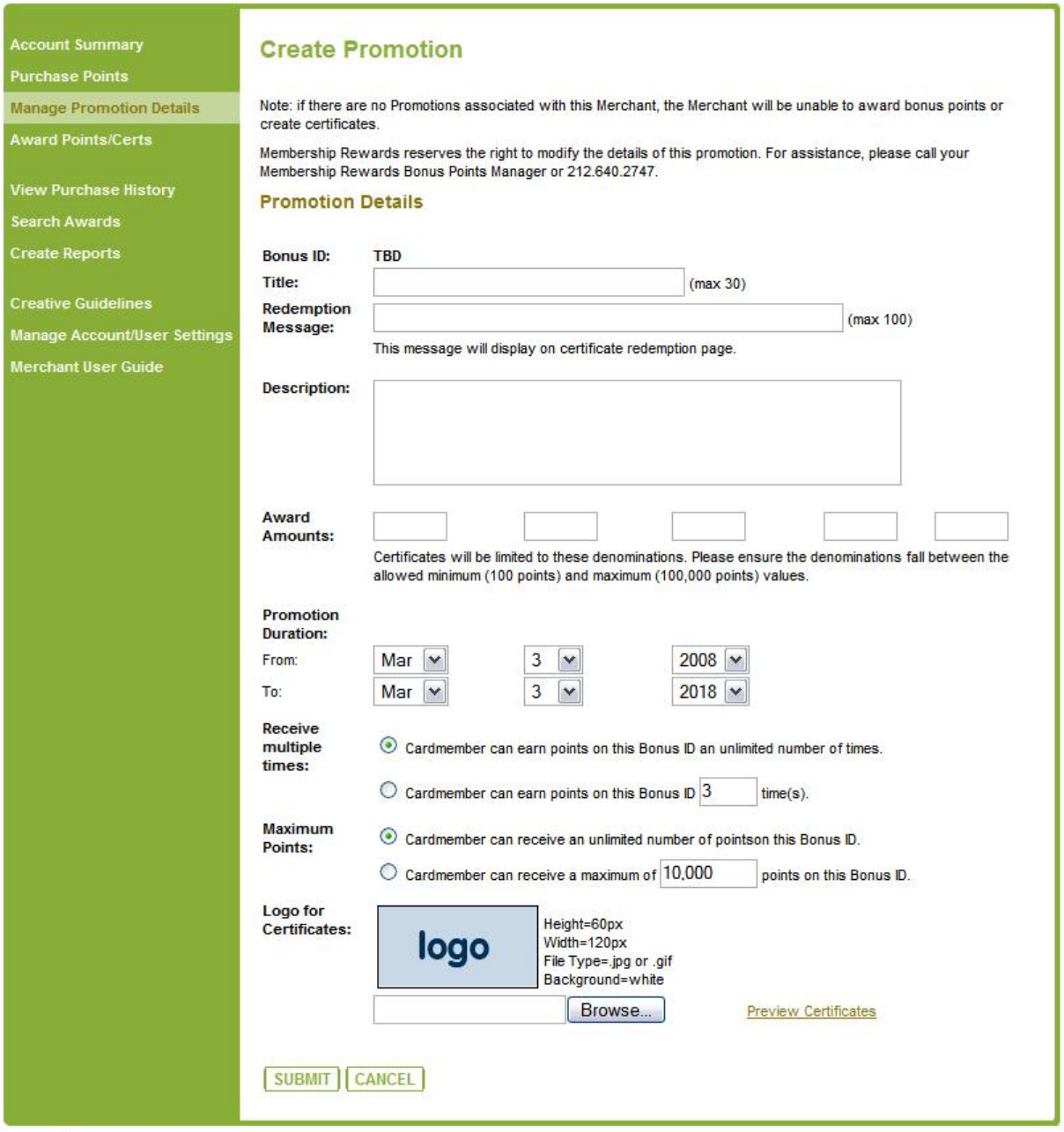

Account Summary
Purchase Points
Manage Promotion Details
Award Points/Certs
View Purchase History
Search Awards
Create Reports
Creative Guidelines
Manage Account/User Settings
Merchant User Guide
Create Promotion
Note: if there are no Promotions associated with this Merchant, the Merchant will be unable to award bonus points or create certificates.
Membership Rewards reserves the right to modify the details of this promotion. For assistance, please call your Membership Rewards Bonus Points Manager or 212.640.2747.
Promotion Details
Bonus ID: TBD
Title: (max 30)
Redemption Message: (max 100)
This message will display on certificate redemption page.
Description:
Award Amounts:
Certificates will be limited to these denominations. Please ensure the denominations fall between the allowed minimum (100 points) and maximum (100,000 points) values.
Promotion Duration:
From: Mar 3 2008
To: Mar 3 2018
Receive multiple times:
Cardmember can earn points on this Bonus ID an unlimited number of times.
Cardmember can earn points on this Bonus ID 3 time(s).
Maximum Points:
Cardmember can receive an unlimited number of pointson this Bonus ID.
Cardmember can receive a maximum of 10,000 points on this Bonus ID.
Logo for Certificates:
logo
Height=60px
Width=120px
File Type=.jpg or .gif
Background=white
Browse...
Preview Certificates
SUBMIT
CANCEL

Figure 38: Create Promotions

2. Enter the Promotion **Title** (This will be displayed on Bonus Points certificates and the recipients redemption screen)
3. Enter a **redemption message** (This will be displayed on Bonus Points certificates and the recipients redemption screen)

4. Enter a **description** (Use this field to provide a detailed description of the promotion to your Bonus Points administrator)
5. Choose your **Award Amounts** (These will be your available certificate denominations for the promotion you are requesting, please ensure they are within the minimum and maximum award amounts)
6. Choose your **Promotion Duration** (You will not be able to issue awards on this promotion outside of the effective dates, please ensure the dates entered leave enough time to submit all your awards)
7. Specify a **Receive Multiple Times** option (Set a limit on the amount of times an individual can earn a Bonus Points Certificate via this promotion. Note that this restriction can only be enforced at redemption when recipient account details are collected)
8. Specify a **Maximum Points** (Set a limit on the number of points an individual can earn via this promotion. Note that this restriction can only be enforced at redemption when recipient account details are collected)
9. Upload your **Logo for Certificates** (The logo provided will be displayed on Bonus Points Certificates as well as appear on the customer redemption screen. Please ensure the logo uploaded is within the dimensions provided on the screen)
10. Click **Preview Certificates** to view a sample of a Bonus Points certificate complete with the information entered on this screen.
11. Click **submit** to send your promotion to your Bonus Points Administrator for approval

6.3 Approving a Promotion

When your Bonus Points Administrator has approved your promotion you will need to make a final approval in order to activate the promotion. When your Bonus Points administrator has approved your promotion you will receive an email. Return to the **Manage Promotion Details** screen and you will see the promotion in the Promotions Awaiting Approval section with a new status of **Awaiting Approval (Merchant).** Follow these steps to approve your promotion.

1. Select your promotion
2. On the Approve Promotion Details screen select the Approval checkbox and click Save.
3. Your promotion will now be active and available to award certificates immediately.

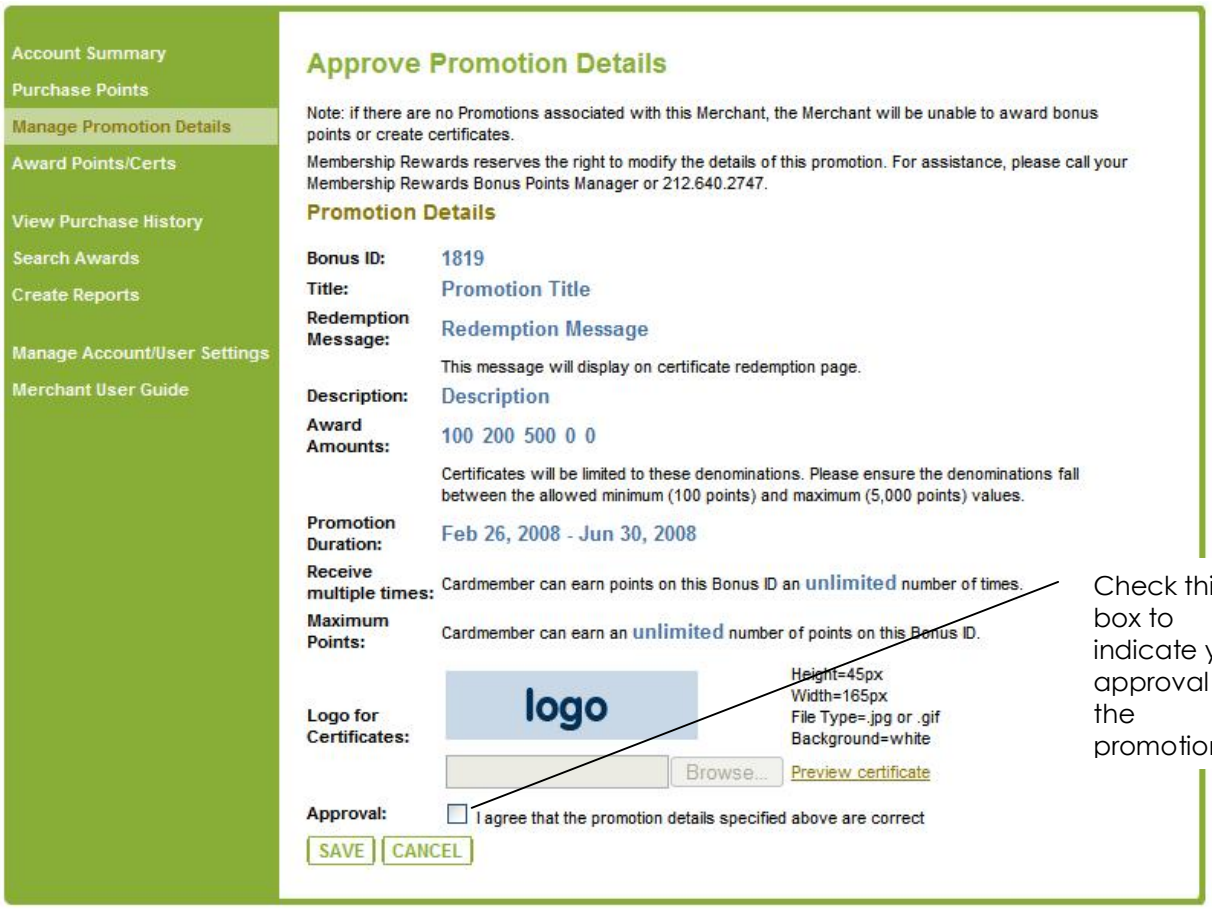

Account Summary
Purchase Points
Manage Promotion Details
Award Points/Certs
View Purchase History
Search Awards
Create Reports
Manage Account/User Settings
Merchant User Guide
Approve Promotion Details
Note: if there are no Promotions associated with this Merchant, the Merchant will be unable to award bonus points or create certificates.
Membership Rewards reserves the right to modify the details of this promotion. For assistance, please call your Membership Rewards Bonus Points Manager or 212.640.2747.
Promotion Details
Bonus ID: 1819
Title: Promotion Title
Redemption Message: Redemption Message
This message will display on certificate redemption page.
Description: Description
Award Amounts: 100 200 500 0 0
Certificates will be limited to these denominations. Please ensure the denominations fall between the allowed minimum (100 points) and maximum (5,000 points) values.
Promotion Duration: Feb 26, 2008 - Jun 30, 2008
Receive multiple times: Cardmember can earn points on this Bonus ID an unlimited number of times.
Maximum Points: Cardmember can earn an unlimited number of points on this Bonus ID.
Logo for Certificates: logo
Height=45px
Width=165px
File Type=.jpg or .gif
Background=white
Browse...
Preview certificate
Approval: I agree that the promotion details specified above are correct
SAVE
CANCEL
Check this box to indicate your approval of the promotion

Figure 39: Approve Promotion Details

6.4 *Viewing a Promotion*

From the Manage Promotion Details screen click on any Bonus ID to view a promotion

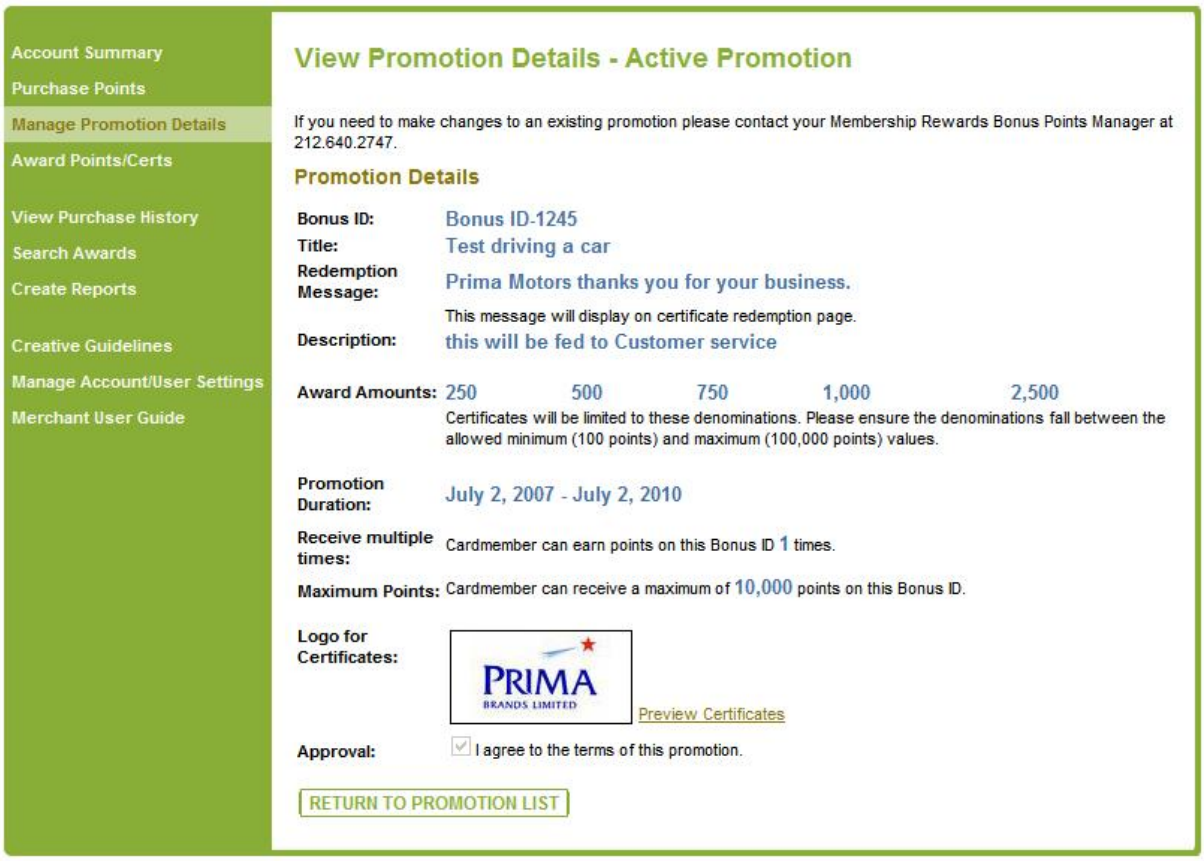

Account Summary
Purchase Points
Manage Promotion Details
Award Points/Certs
View Purchase History
Search Awards
Create Reports
Creative Guidelines
Manage Account/User Settings
Merchant User Guide
View Promotion Details - Active Promotion
If you need to make changes to an existing promotion please contact your Membership Rewards Bonus Points Manager at 212.640.2747.
Promotion Details
Bonus ID: Bonus ID-1245
Title: Test driving a car
Redemption Message: Prima Motors thanks you for your business.
This message will display on certificate redemption page.
Description: this will be fed to Customer service
Award Amounts: 250 500 750 1,000 2,500
Certificates will be limited to these denominations. Please ensure the denominations fall between the allowed minimum (100 points) and maximum (100,000 points) values.
Promotion Duration: July 2, 2007 - July 2, 2010
Receive multiple times: Cardmember can earn points on this Bonus ID 1 times.
Maximum Points: Cardmember can receive a maximum of 10,000 points on this Bonus ID.
Logo for Certificates:
PRIMA
BRANDS LIMITED
Preview Certificates
Approval: I agree to the terms of this promotion.
RETURN TO PROMOTION LIST

Figure 40: View Promotion Details

Once a promotion has become active only a Bonus Points Administrator may make modifications to a promotion. Should you need to modify an active promotion please contact your Bonus Points Administrator.

7 Awarding Bonus Points Certificates

This chapter describes how to award Bonus Points Certificates. Bonus Points Certificates can be awarded either via print/paper certificate or via email certificate. . The chapter contains the following sections:

- Choosing a Distribution Method (Print vs Email)
- Awarding Points by Printed Certificate
- Awarding Points by Emailed Certificate
- Awarding Points by Bulk Email

7.1 Choosing a Distribution Method

There are three methods of distributing points you have purchased through Bonus Points Certificate Program. You can:

- Print up to 15 certificates from a local printer
- Email a certificate to up to 15 recipients for whom you have a valid email address
- Upload a file listing up to 200 recipients, each of whom will receive an emailed certificate

To choose a distribution method, do the following:

1. From the menu bar on any page on the Bonus Points Certificate Program site, click **Award Points/Certs**.
2. On Award Points page, click whichever link corresponds to the distribution method you want:
   - **Print Certificates Locally** to print certificates yourself
   - **Emailed Certificates** to send up to 15 certificates by email
   - **Award Batch** to use email distribution to up to 200 recipients

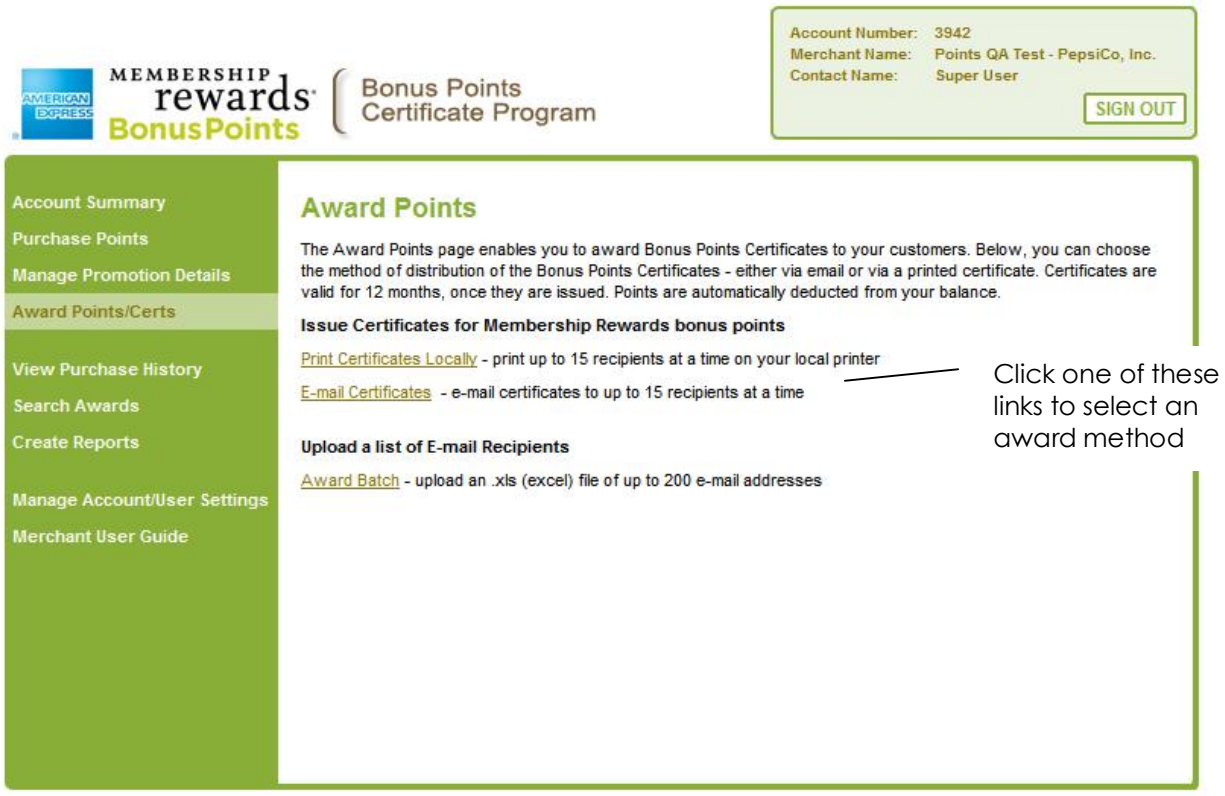

MEMBERSHIP rewards
BonusPoints
Bonus Points Certificate Program
Account Number: 3942
Merchant Name: Points QA Test - PepsiCo, Inc.
Contact Name: Super User
SIGN OUT
Account Summary
Purchase Points
Manage Promotion Details
Award Points/Certs
View Purchase History
Search Awards
Create Reports
Manage Account/User Settings
Merchant User Guide
Award Points
The Award Points page enables you to award Bonus Points Certificates to your customers. Below, you can choose the method of distribution of the Bonus Points Certificates - either via email or via a printed certificate. Certificates are valid for 12 months, once they are issued. Points are automatically deducted from your balance.
Issue Certificates for Membership Rewards bonus points
Print Certificates Locally - print up to 15 recipients at a time on your local printer
E-mail Certificates - e-mail certificates to up to 15 recipients at a time
Upload a list of E-mail Recipients
Award Batch - upload an .xls (excel) file of up to 200 e-mail addresses
Click one of these links to select an award method

Figure 23: Choosing an award method

7.2 *Awarding Points by Printed Certificate*

If you chose Print Certificates Locally in section 6.1, you follow a three-step process.

7.2.1 Setting Up Award Certificates

To set up certificates for printing, do the following:

1. On the Award Points - Print Certificates Locally Step 1 page, check your balance to confirm you have enough points to award. If you have to buy more points, see section 5 on page 27.
2. Check to ensure that the promotion for which you want to award points is shown in the **Promotions** list. If you do not see the promotion you want, click **Manage Promotion Details** and set up the promotion (for more see section 7)
3. From **Bonus ID** select the ID of the promotion for which you want to award a Bonus Points Certificate
4. From **Points** choose the number of points to award.

Note: Steps 5 through 7 are optional. If you provide this information, the appropriate certificate will be personalized when you print it.

5. In **First Name**, type the first name of the person to whom you want to award points.
6. In **Last Name**, type the person's last name.

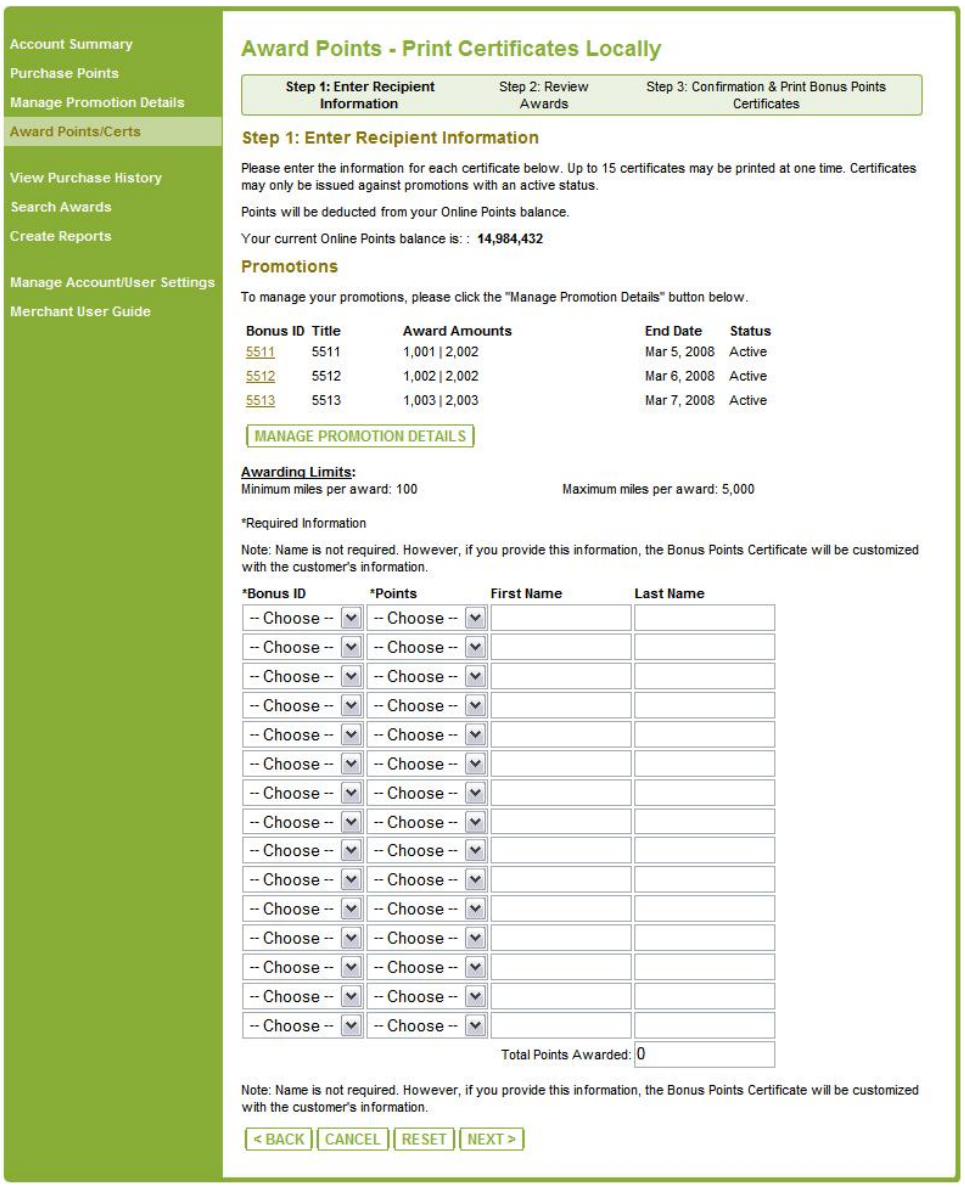

Account Summary
Purchase Points
Manage Promotion Details
Award Points/Certs
View Purchase History
Search Awards
Create Reports
Manage Account/User Settings
Merchant User Guide
Award Points - Print Certificates Locally
Step 1: Enter Recipient Information
Step 2: Review Awards
Step 3: Confirmation & Print Bonus Points Certificates
Step 1: Enter Recipient Information
Please enter the information for each certificate below. Up to 15 certificates may be printed at one time. Certificates may only be issued against promotions with an active status.
Points will be deducted from your Online Points balance.
Your current Online Points balance is: : 14,984,432
Promotions
To manage your promotions, please click the "Manage Promotion Details" button below.
Bonus ID Title Award Amounts End Date Status
5511 5511 1,001 | 2,002 Mar 5, 2008 Active
5512 5512 1,002 | 2,002 Mar 6, 2008 Active
5513 5513 1,003 | 2,003 Mar 7, 2008 Active
MANAGE PROMOTION DETAILS
Awarding Limits:
Minimum miles per award: 100
Maximum miles per award: 5,000
*Required Information
Note: Name is not required. However, if you provide this information, the Bonus Points Certificate will be customized with the customer's information.
*Bonus ID
*Points
First Name
Last Name
-- Choose --
Total Points Awarded: 0
Note: Name is not required. However, if you provide this information, the Bonus Points Certificate will be customized with the customer's information.
< BACK
CANCEL
RESET
NEXT >

Figure 24: Creating a list of recipients for printed certificates

7. Repeat steps 3 through 7 for each recipient, to a maximum of 15.
8. Click **Next**.

7.2.2 Reviewing Awards

To review the awards you set up for printing, do the following:

1. On the Award Points – Print Certificates Locally Step 2 page, click the **Preview Certificates** button. Your certificates will open in a new browser window.

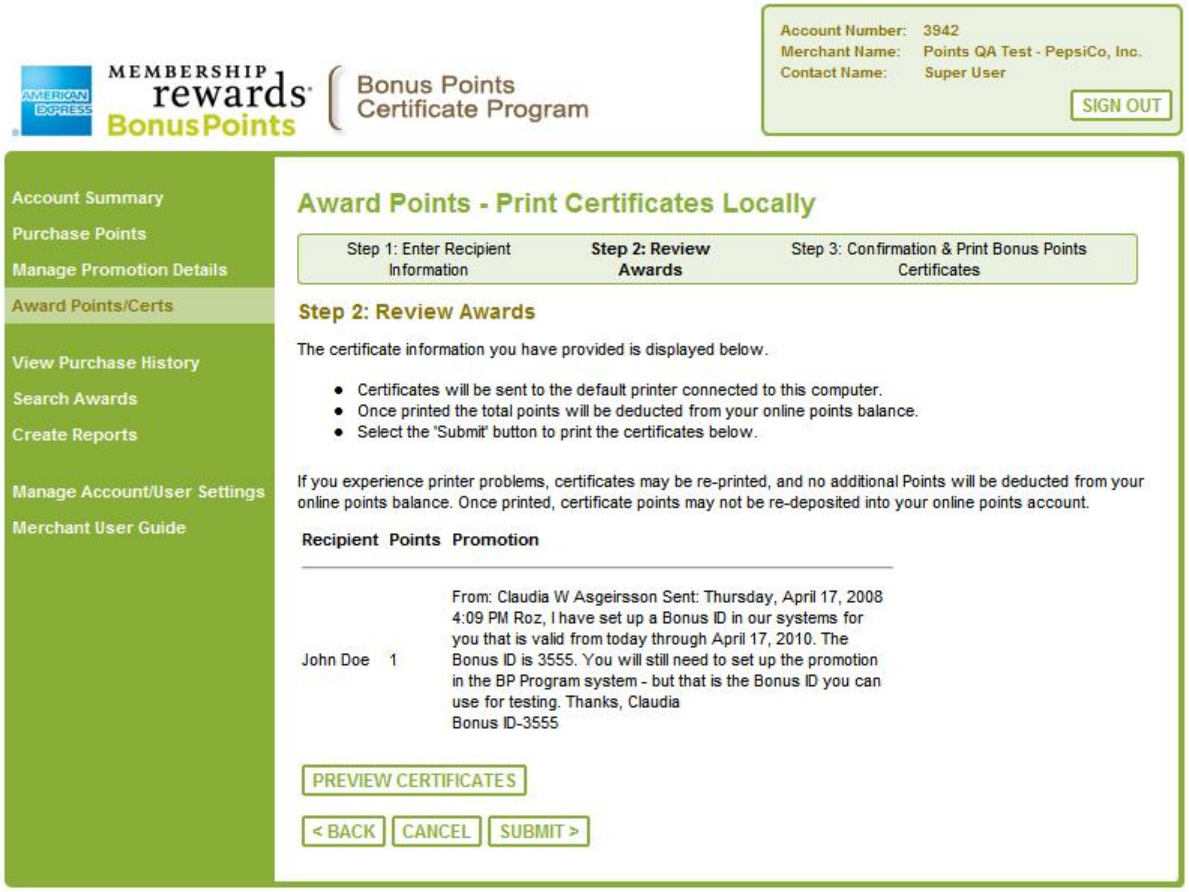

MEMBERSHIP rewards BonusPoints
Bonus Points Certificate Program
Account Number: 3942
Merchant Name: Points QA Test - PepsiCo, Inc.
Contact Name: Super User
SIGN OUT
Account Summary
Purchase Points
Manage Promotion Details
Award Points/Certs
View Purchase History
Search Awards
Create Reports
Manage Account/User Settings
Merchant User Guide
Award Points - Print Certificates Locally
Step 1: Enter Recipient Information
Step 2: Review Awards
Step 3: Confirmation & Print Bonus Points Certificates
Step 2: Review Awards
The certificate information you have provided is displayed below.
Certificates will be sent to the default printer connected to this computer.
Once printed the total points will be deducted from your online points balance.
Select the 'Submit' button to print the certificates below.
If you experience printer problems, certificates may be re-printed, and no additional Points will be deducted from your online points balance. Once printed, certificate points may not be re-deposited into your online points account.
Recipient Points Promotion
John Doe 1
From: Claudia W Asgeirsson Sent: Thursday, April 17, 2008 4:09 PM Roz, I have set up a Bonus ID in our systems for you that is valid from today through April 17, 2010. The Bonus ID is 3555. You will still need to set up the promotion in the BP Program system - but that is the Bonus ID you can use for testing. Thanks, Claudia
Bonus ID-3555
PREVIEW CERTIFICATES
< BACK
CANCEL
SUBMIT >

Figure 25: Reviewing printed certificate awards

2. If any of the individual award details have to be changed, click **Back**. (Do not use your browser's Back button.) Make the changes on the Step 1 page.
3. When you are ready to print the certificates, click **Finish**.

7.2.3 Confirming Printed Awards

When you click **Finish** a processing page may appear briefly as the certificates are sent to the printer. Printed certificates are always printed on the default

printer specified for the computer from which you set up the awards. If possible, please print the certificates on a color printer.

When the Step 3 page appears, do the following:

1. Collect the printed certificates and check to be sure all of them printed.
2. If there was a printing problem, click **Re-Print the Certificates**. Reprinting does not deduct any further points from your balance.
3. Click **Print this confirmation page for your records** in order to get a receipt.
4. Do one of the following:
   - To set up another set of awards, click **Award More Points**
   OR
   - Click any other link in the menu bar

Account Summary
Purchase Points
Manage Promotion Details
Award Points/Certs
View Purchase History
Search Awards
Create Reports
Creative Guidelines
Manage Account/User Settings
Merchant User Guide
Award Points - Print Certificates Locally
Step 1: Enter Recipient Information
Step 2: Review Awards
Step 3: Confirmation & Print Bonus Points Certificates
Step 3: Confirmation & Print Bonus Points Certificates
Batch ID: 12586
Date: 10/8/107
Total Recipients: 3
Total Points Awarded: 3,250
The following bonus points certificates have been printed and the Points have been deducted from the online points account.
If printer problems are experienced, certificates may be re-printed by clicking on the button below, and no additional points will be deducted from your account.
Recipient
Certificate
Points
Promotion
Steve Ogden steve.ogden@bella.com
PN84-8665-1T54-1D6C
250
Test driving a car Bonus ID-1245
Barry Winters barry@sympatica.ca
8C27-039X-84W0-3E27
500
Leasing a new car Bonus ID-2457
Ann Guylan ann@rogors.com
W3XH-NN72-T222-EM14
2,500
Purchasing a new car Bonus ID-2458
RE-PRINT THE CERTIFICATES
AWARD MORE POINTS
Print this confirmation page for your records.

Figure 26: Confirming the printing of award certificates

7.3 Awarding Points by Emailed Certificate

Awards by email are set up in a similar fashion to printed certificates. A major difference is that emailed awards must be personalized.

7.3.1 Setting Up Award Certificates

To set up certificates to be emailed, do the following:

1. On the Award Points - Email Certificates Locally Step 1 page, check your balance to confirm you have enough points to award. If you have to buy more points, see section 5 on page 27.

2. Check to ensure that the promotion for which you want to award points is shown in the **Promotions** list. If you do not see the promotion you want, click **Manage Promotion Details** and set up the promotion (for more see section 7)

Note: All of the information in steps 3 through 7 is **required** for emailed award certificates.

3. From **Bonus ID** select the ID of the promotion for which you want to award a Bonus Points Certificate.
4. From **Points** choose the number of points to award.
5. In **Email Address** type the recipient's address.
6. In **First Name**, type the first name of the person to whom you want to award points.
7. In **Last Name**, type the person's last name.

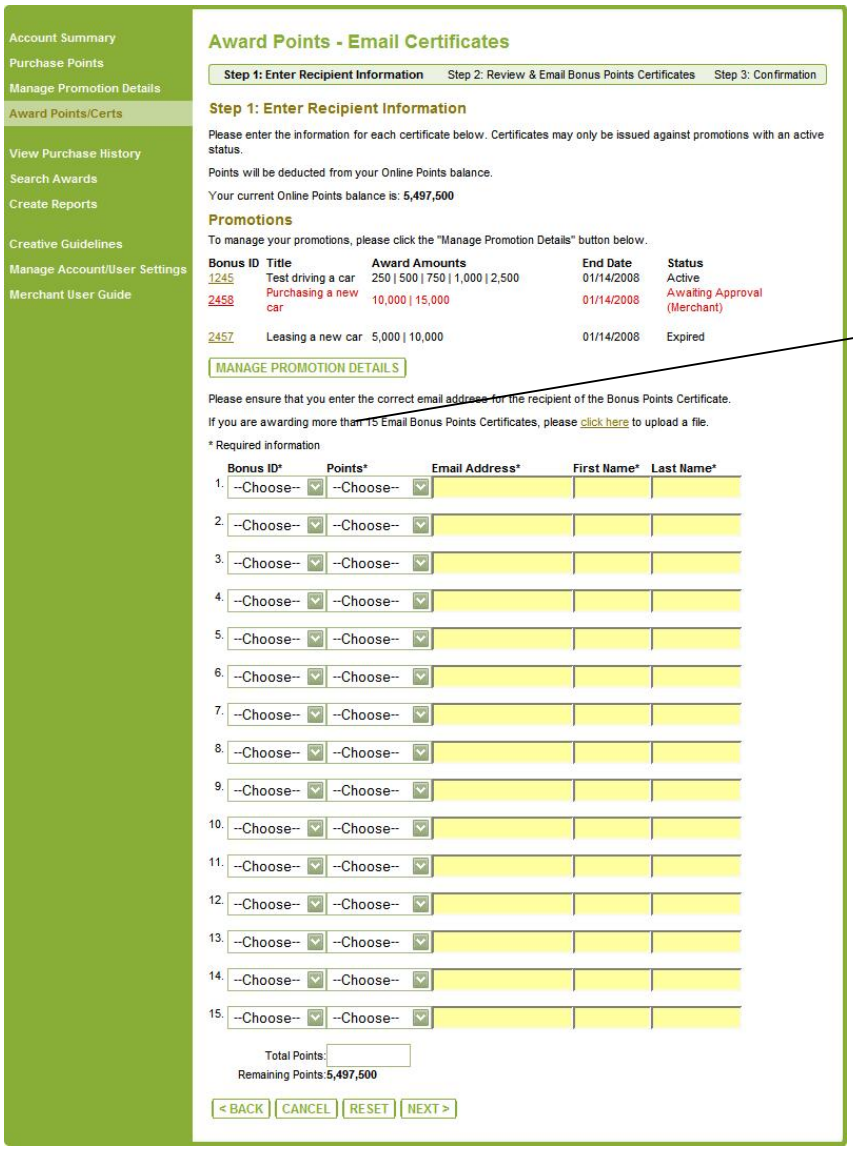

Account Summary
Purchase Points
Manage Promotion Details
Award Points/Certs
View Purchase History
Search Awards
Create Reports
Creative Guidelines
Manage Account/User Settings
Merchant User Guide
Award Points - Email Certificates
Step 1: Enter Recipient Information
Step 2: Review & Email Bonus Points Certificates
Step 3: Confirmation
Step 1: Enter Recipient Information
Please enter the information for each certificate below. Certificates may only be issued against promotions with an active status.
Points will be deducted from your Online Points balance.
Your current Online Points balance is: 5,497,500
Promotions
To manage your promotions, please click the "Manage Promotion Details" button below.
Bonus ID Title Award Amounts End Date Status
1245 Test driving a car 250 | 500 | 750 | 1,000 | 2,500 01/14/2008 Active
2458 Purchasing a new car 10,000 | 15,000 01/14/2008 Awaiting Approval (Merchant)
2457 Leasing a new car 5,000 | 10,000 01/14/2008 Expired
MANAGE PROMOTION DETAILS
Please ensure that you enter the correct email address for the recipient of the Bonus Points Certificate.
If you are awarding more than 15 Email Bonus Points Certificates, please click here to upload a file.
* Required information
Bonus ID* Points* Email Address* First Name* Last Name*
1. --Choose-- --Choose--
2. --Choose-- --Choose--
3. --Choose-- --Choose--
4. --Choose-- --Choose--
5. --Choose-- --Choose--
6. --Choose-- --Choose--
7. --Choose-- --Choose--
8. --Choose-- --Choose--
9. --Choose-- --Choose--
10. --Choose-- --Choose--
11. --Choose-- --Choose--
12. --Choose-- --Choose--
13. --Choose-- --Choose--
14. --Choose-- --Choose--
15. --Choose-- --Choose--
Total Points:
Remaining Points: 5,497,500
< BACK
CANCEL
RESET
NEXT >
You must provide all of this information for each recipient

Figure 27: Creating a list of email award recipients

8. Repeat steps 3 through 7 for each recipient, to a maximum of 15.
9. Click **Next**.

7.3.2 Reviewing Email Awards

To review the awards you set up for emailing, do the following:

1. On the Award Points – Email Certificates Step 2 page, examine the certificate information displayed.

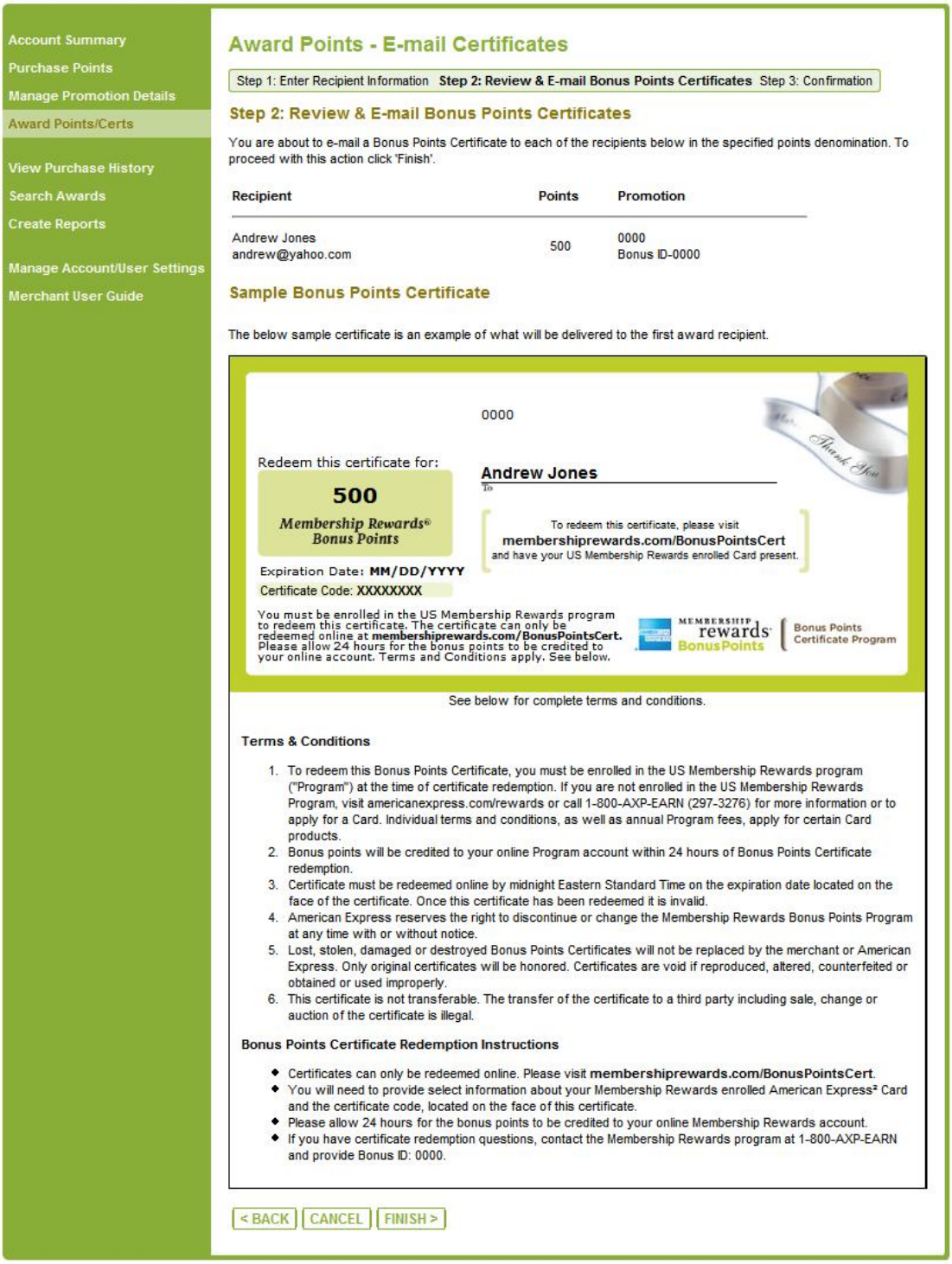

Account Summary
Purchase Points
Manage Promotion Details
Award Points/Certs
View Purchase History
Search Awards
Create Reports
Manage Account/User Settings
Merchant User Guide
Award Points - E-mail Certificates
Step 1: Enter Recipient Information Step 2: Review & E-mail Bonus Points Certificates Step 3: Confirmation
Step 2: Review & E-mail Bonus Points Certificates
You are about to e-mail a Bonus Points Certificate to each of the recipients below in the specified points denomination. To proceed with this action click 'Finish'.
Recipient
Points
Promotion
Andrew Jones
andrew@yahoo.com
500
0000
Bonus ID-0000
Sample Bonus Points Certificate
The below sample certificate is an example of what will be delivered to the first award recipient.
0000
Redeem this certificate for:
500
Membership Rewards® Bonus Points
Andrew Jones
To
To redeem this certificate, please visit
membershiprewards.com/BonusPointsCert
and have your US Membership Rewards enrolled Card present.
Expiration Date: MM/DD/YYYY
Certificate Code: XXXXXXXX
You must be enrolled in the US Membership Rewards program to redeem this certificate. The certificate can only be redeemed online at membershiprewards.com/BonusPointsCert. Please allow 24 hours for the bonus points to be credited to your online account. Terms and Conditions apply. See below.
MEMBERSHIP rewards BonusPoints
Bonus Points Certificate Program
See below for complete terms and conditions.
Terms & Conditions
1. To redeem this Bonus Points Certificate, you must be enrolled in the US Membership Rewards program ("Program") at the time of certificate redemption. If you are not enrolled in the US Membership Rewards Program, visit americanexpress.com/rewards or call 1-800-AXP-EARN (297-3276) for more information or to apply for a Card. Individual terms and conditions, as well as annual Program fees, apply for certain Card products.
2. Bonus points will be credited to your online Program account within 24 hours of Bonus Points Certificate redemption.
3. Certificate must be redeemed online by midnight Eastern Standard Time on the expiration date located on the face of the certificate. Once this certificate has been redeemed it is invalid.
4. American Express reserves the right to discontinue or change the Membership Rewards Bonus Points Program at any time with or without notice.
5. Lost, stolen, damaged or destroyed Bonus Points Certificates will not be replaced by the merchant or American Express. Only original certificates will be honored. Certificates are void if reproduced, altered, counterfeited or obtained or used improperly.
6. This certificate is not transferable. The transfer of the certificate to a third party including sale, change or auction of the certificate is illegal.
Bonus Points Certificate Redemption Instructions
Certificates can only be redeemed online. Please visit membershiprewards.com/BonusPointsCert.
You will need to provide select information about your Membership Rewards enrolled American Express² Card and the certificate code, located on the face of this certificate.
Please allow 24 hours for the bonus points to be credited to your online Membership Rewards account.
If you have certificate redemption questions, contact the Membership Rewards program at 1-800-AXP-EARN and provide Bonus ID: 0000.
< BACK
CANCEL
FINISH >

Figure 28: Reviewing emailed awards

2. If any of the individual award details have to be changed, click **Back**. (Do not use your browser's Back button.) Make the changes on the Step 1 page.
3. When you are ready to issue/email the certificates, click **Finish**.

7.3.3 Confirming Emailed Awards

When you click **Finish** a processing page may appear briefly as the certificates are emailed to your recipients.

When the Step 3 page appears, do the following:

1. Click **Print this confirmation page for your records** in order to get a receipt.
2. Do one of the following:
   - To set up another set of awards, click **Award More Points**
   OR
   - Click any other link in the menu bar

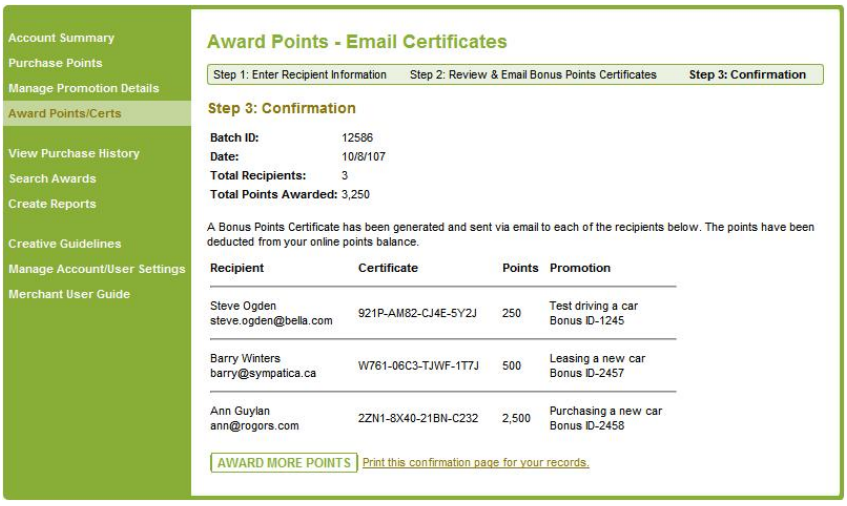


Figure 29: Confirming the emailing of award certificates

7.4 Awarding Points by Bulk Email

Bulk email allows you to award Bonus Points Certificates to a group of recipients in a single transaction. In order to use the bulk email feature you must:

- Obtain the Bonus Points Certificate Program deposit file template
- Be able to upload files through your browser

7.4.1 Obtaining the Bonus Points Certificate Program File Template

Bonus Points Certificate Program uses Microsoft Excel (.xls) files for receiving bulk email information. All files you send for bulk deposit must conform to a template. To obtain a copy of this template for your use, do the following:

- On the Award Points - Bulk Deposit page, click the link in the line **File Template**. This will enable you to download the template to your computer.

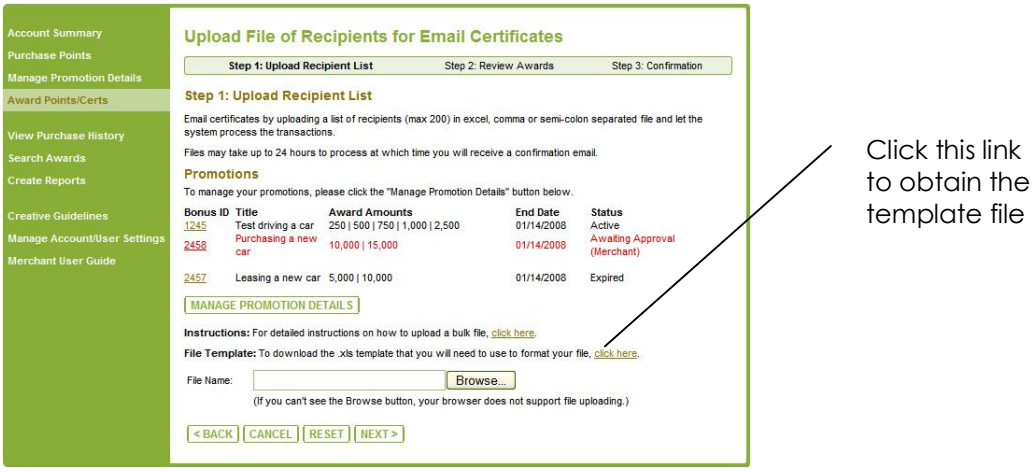

Account Summary
Purchase Points
Manage Promotion Details
Award Points/Certs
View Purchase History
Search Awards
Create Reports
Creative Guidelines
Manage Account/User Settings
Merchant User Guide
Upload File of Recipients for Email Certificates
Step 1: Upload Recipient List
Step 2: Review Awards
Step 3: Confirmation
Step 1: Upload Recipient List
Email certificates by uploading a list of recipients (max 200) in excel, comma or semi-colon separated file and let the system process the transactions.
Files may take up to 24 hours to process at which time you will receive a confirmation email.
Promotions
To manage your promotions, please click the "Manage Promotion Details" button below.
Bonus ID Title Award Amounts End Date Status
1245 Test driving a car 250 | 500 | 750 | 1,000 | 2,500 01/14/2008 Active
2458 Purchasing a new car 10,000 | 15,000 01/14/2008 Awaiting Approval (Merchant)
2457 Leasing a new car 5,000 | 10,000 01/14/2008 Expired
MANAGE PROMOTION DETAILS
Instructions: For detailed instructions on how to upload a bulk file, click here.
File Template: To download the .xls template that you will need to use to format your file, click here.
File Name:
Browse...
(If you can't see the Browse button, your browser does not support file uploading.)
< BACK
CANCEL
RESET
NEXT >
Click this link to obtain the template file

Figure 30: Obtaining the bulk deposit template file

7.4.2 Preparing a Bulk Award File

Take care when preparing a bulk email award file. If you do not follow these instructions closely, your upload may fail, or individual awards may not go through. To prepare a file for bulk deposit, do the following:

1. When you download the email bulk upload template file, save it on your computer in a location of your choice. We recommend you save it under the existing name.
2. Open the file and make a copy by using the Save As command, using the name of your choice.
3. Type or paste the records of the individuals to whom you want to award Bonus Points Certificates. If you are pasting records, use the Paste Special command and paste the data as Text.
4. Do not make any formatting changes. All cells must be formatted as "Text". Do not use bold, italics, or other text decoration. Do not include formulas.
5. Use only the first worksheet, and do not change the worksheet name.
6. Save the file, making sure to retain the .xls extension.

7.4.3 Uploading a Bulk Award File

Once you have created a bulk award file formatted using the Bonus Points Certificate Program template, you award points by uploading the file to the Bonus Points Certificate Program. To upload a bulk deposit file, do the following:

1. Verify that your bulk deposit filename has a .xls extension.
2. On the Upload File of Recipients page, click **Browse**.

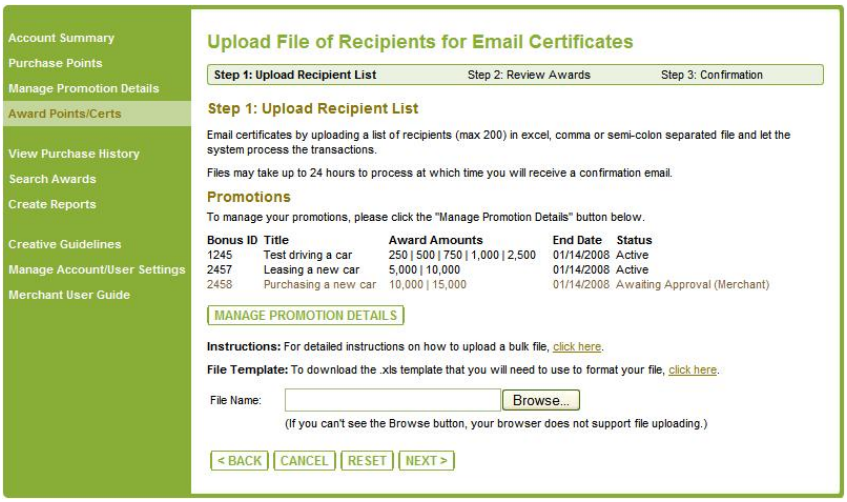

Account Summary
Purchase Points
Manage Promotion Details
Award Points/Certs
View Purchase History
Search Awards
Create Reports
Creative Guidelines
Manage Account/User Settings
Merchant User Guide
Upload File of Recipients for Email Certificates
Step 1: Upload Recipient List
Step 2: Review Awards
Step 3: Confirmation
Step 1: Upload Recipient List
Email certificates by uploading a list of recipients (max 200) in excel, comma or semi-colon separated file and let the system process the transactions.
Files may take up to 24 hours to process at which time you will receive a confirmation email.
Promotions
To manage your promotions, please click the "Manage Promotion Details" button below.
Bonus ID Title Award Amounts End Date Status
1245 Test driving a car 250 | 500 | 750 | 1,000 | 2,500 01/14/2008 Active
2457 Leasing a new car 5,000 | 10,000 01/14/2008 Active
2458 Purchasing a new car 10,000 | 15,000 01/14/2008 Awaiting Approval (Merchant)
MANAGE PROMOTION DETAILS
Instructions: For detailed instructions on how to upload a bulk file, click here.
File Template: To download the .xls template that you will need to use to format your file, click here.
File Name:
Browse...
(If you can't see the Browse button, your browser does not support file uploading.)
< BACK
CANCEL
RESET
NEXT >

Figure 31: Uploading a list of email recipients

Note: If you do not see the **Browse** button, your browser is not capable of uploading files. Use a different browser to perform this task, or choose a different method of awarding points.

3. In the dialog box, select the file containing the deposit information.
4. Click **Open**.
5. If there are any errors in the file, messages describing them appear on the page. If you can fix these errors yourself, go back into the file and make the corrections, then repeat steps 2 through 4 to re-upload the file.

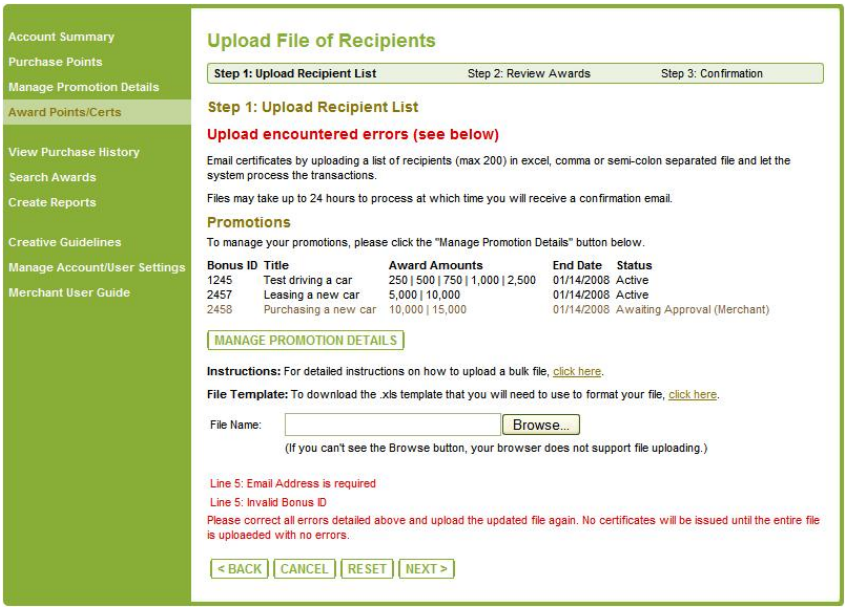

Account Summary
Purchase Points
Manage Promotion Details
Award Points/Certs
View Purchase History
Search Awards
Create Reports
Creative Guidelines
Manage Account/User Settings
Merchant User Guide
Upload File of Recipients
Step 1: Upload Recipient List
Step 2: Review Awards
Step 3: Confirmation
Step 1: Upload Recipient List
Upload encountered errors (see below)
Email certificates by uploading a list of recipients (max 200) in excel, comma or semi-colon separated file and let the system process the transactions.
Files may take up to 24 hours to process at which time you will receive a confirmation email.
Promotions
To manage your promotions, please click the "Manage Promotion Details" button below.
Bonus ID Title Award Amounts End Date Status
1245 Test driving a car 250 | 500 | 750 | 1,000 | 2,500 01/14/2008 Active
2457 Leasing a new car 5,000 | 10,000 01/14/2008 Active
2458 Purchasing a new car 10,000 | 15,000 01/14/2008 Awaiting Approval (Merchant)
MANAGE PROMOTION DETAILS
Instructions: For detailed instructions on how to upload a bulk file, click here.
File Template: To download the .xls template that you will need to use to format your file, click here.
File Name:
Browse...
(If you can't see the Browse button, your browser does not support file uploading.)
Line 5: Email Address is required
Line 5: Invalid Bonus ID
Please correct all errors detailed above and upload the updated file again. No certificates will be issued until the entire file is uploaeded with no errors.
< BACK
CANCEL
RESET
NEXT >

Figure 32: You are told if there are errors in your file

6. Repeat this process as many times as required to upload the file with no error messages.
7. Back on the Upload File of Recipients page, click **Next**.
8. On the Step 2 page make sure that the information displayed matches the file you uploaded.

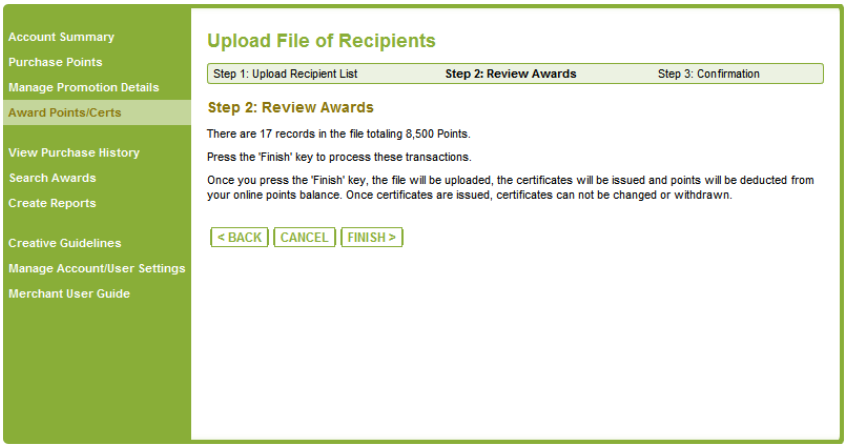

Account Summary
Purchase Points
Manage Promotion Details
Award Points/Certs
View Purchase History
Search Awards
Create Reports
Creative Guidelines
Manage Account/User Settings
Merchant User Guide
Upload File of Recipients
Step 1: Upload Recipient List
Step 2: Review Awards
Step 3: Confirmation
Step 2: Review Awards
There are 17 records in the file totaling 8,500 Points.
Press the 'Finish' key to process these transactions.
Once you press the 'Finish' key, the file will be uploaded, the certificates will be issued and points will be deducted from your online points balance. Once certificates are issued, certificates can not be changed or withdrawn.
< BACK
CANCEL
FINISH >

Figure 33: Reviewing a bulk file upload

9. To complete the upload, click **Finish**.

Once receipt of your file is established you are sent a confirmation email. You should receive your email within 24 hours. This email explains the results of the upload; any awards that failed are identified.

7.5 Searching for Award Records

You can locate details of individual awards by using the Bonus Points Certificate Program site's search function. You can search for awards on any of the following criteria:

- Batch ID
- Bonus ID
- Certificate Code
- Confirmation Number
- Email Address
- Issue Date
- Last Name

To search for records, do the following:

1. On the menu bar, click **Search Awards**.

2. On the Search Bonus Points Certificate Awards page, choose your search criterion. From the **Search By** list choose the information type you want to search for.

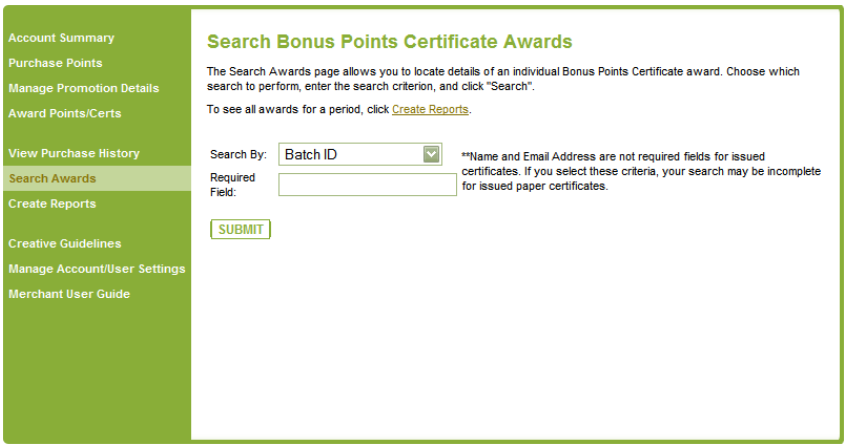

Account Summary
Purchase Points
Manage Promotion Details
Award Points/Certs
View Purchase History
Search Awards
Create Reports
Creative Guidelines
Manage Account/User Settings
Merchant User Guide
Search Bonus Points Certificate Awards
The Search Awards page allows you to locate details of an individual Bonus Points Certificate award. Choose which search to perform, enter the search criterion, and click "Search".
To see all awards for a period, click Create Reports.
Search By:
Batch ID
Required Field:
**Name and Email Address are not required fields for issued certificates. If you select these criteria, your search may be incomplete for issued paper certificates.
SUBMIT

Figure 34: Searching for awards

3. In"**Required Field"**, type the precise information you want to find.

Note: You must type the information exactly as it was entered into the system. Search terms are case-sensitive. You cannot use wildcards. If you do not provide an exact match the search will return no results.

4. Click **Search**.

If your search is successful the relevant records appear on the Search Results page.

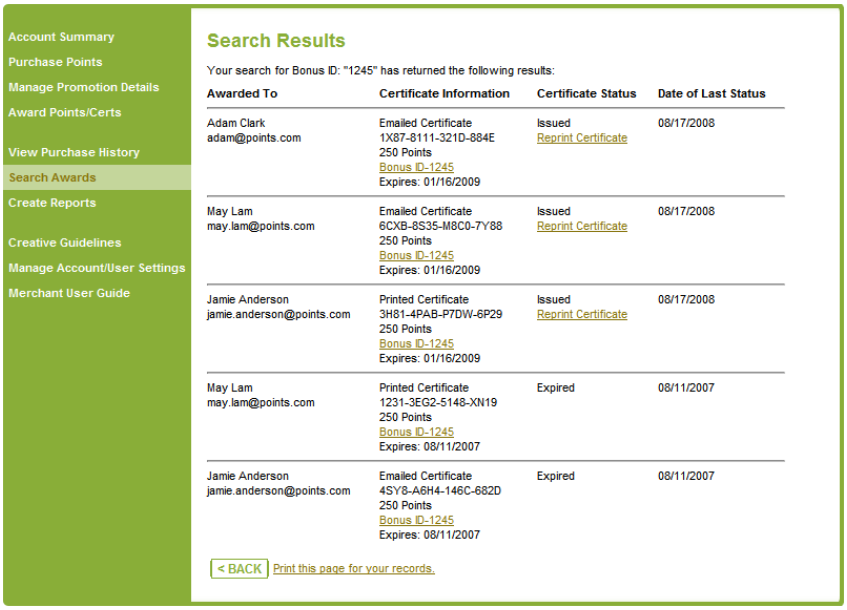


Figure 35: Viewing the results of an awards search

- Click on the **Bonus ID** to view the details of the promotion related to the award
- The **Date of Last Status** column refers to the date this award most recently underwent a status change
- When a printed certificate is in **Issued** status click the **Reprint Certificates** link to reprint the certificate

7.6 *Viewing Reports*

The Bonus Points Certificate Program system allows you to view reports on specific bonus IDs.

Reports are generated by the system whenever you use the Create Reports page to view them.

To create and view a report, do the following:

1. On the menu bar, click **Create Reports**.
2. On the Create Reports page, from **Bonus ID** select the bonus type whose awards details you want to view.

Account Summary
Purchase Points
Manage Promotion Details
Award Points/Certs
View Purchase History
Search Awards
Create Reports
Creative Guidelines
Manage Account/User Settings
Merchant User Guide
Create Reports
The Create Reports page allows you to view all Bonus Points Certificates awarded for a period. Choose a Bonus ID, enter the date range, and click "View Report".
To locate details of an individual Bonus Points Certificate award, click Search Awards on the left navigation bar.
Bonus ID: --Choose Bonus ID--
From: Jan 1 2007
To: Nov 8 2007
VIEW REPORT

Figure 36: Choosing a report to view

3. From the drop-down lists in **From**, choose the month, day and year of the earliest awards to be included in the report.
4. From the drop-down lists it **To**, choose the month, day and year of the latest awards to be included.
5. Click **View Report**.

If a matching report exists it appears on the Reports page.

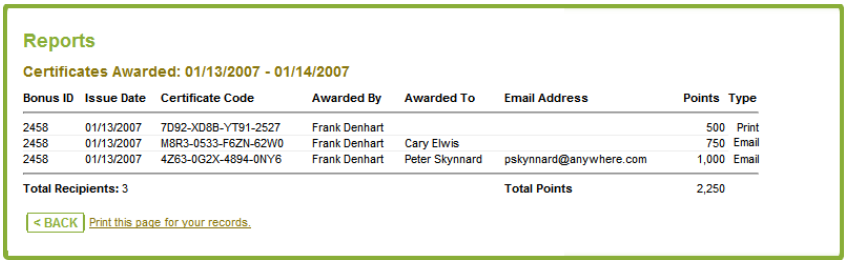

Reports
Certificates Awarded: 01/13/2007 - 01/14/2007
Bonus ID Issue Date Certificate Code Awarded By Awarded To Email Address Points Type
2458 01/13/2007 7D92-XD8B-YT91-2527 Frank Denhart 500 Print
2458 01/13/2007 M8R3-0533-F6ZN-62W0 Frank Denhart Cary Elwis 750 Email
2458 01/13/2007 4Z63-0G2X-4894-0NY6 Frank Denhart Peter Skynnard pskynnard@anywhere.com 1,000 Email
Total Recipients: 3
Total Points 2,250
< BACK
Print this page for your records.

Figure 37: Viewing a report

The report returned will contain up to date information related to all awards matching the report criteria